

## Chapter 4 Other Personnel Actions



### Process a Rehire (Former NAF Employees)

This procedure should be used to “rehire” when processing **former NAF employees**. All of these former employees should already be in the HR system. You will be required to enter the former employee’s Personnel ID number.

This action uses the copy mode for several infotypes. It is important that you remember the information that has defaulted in the fields pertains to a previous action and some fields may need to be changed to reflect the current action.

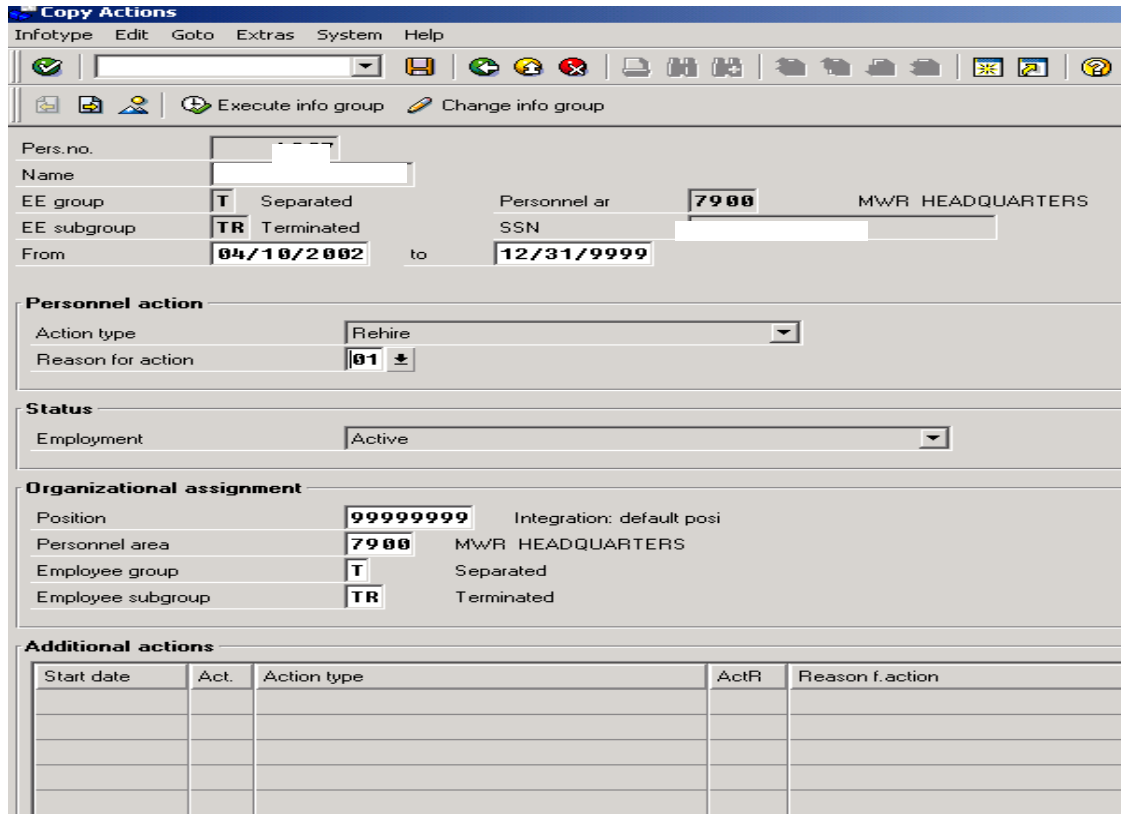
After you have entered your changes to an infotype and used the enter key, you should receive a message telling you that a previous entry will be delimited. This verifies that you want to make the change and that you previously have changed the “From Date” to reflect that your record will now be the current record. You will proceed through the message by using the Enter key and you will then be prompted to save your entries.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

Action type	Personnel no.	EE group	EE subgroup
New Hire			
Change in Position			
Multiple Position Assignment			
Separation			
Rehire			
Leave of Absence			
Return from Leave of Absence			
Adjustment in Pay			
Retirement			
External Hire			
External Separation			

Press the Execute icon  and the Infotype 0000 - Copy Actions screen is shown.



**Copy Actions**  
Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.no. [ ]  
Name [ ]  
EE group **T** Separated Personnel ar **7900** MWR HEADQUARTERS  
EE subgroup **TR** Terminated SSN [ ]  
From **04/10/2002** to **12/31/9999**

**Personnel action**  
Action type Rehire  
Reason for action **01** [ ]

**Status**  
Employment Active

**Organizational assignment**  
Position **99999999** Integration: default posi  
Personnel area **7900** MWR HEADQUARTERS  
Employee group **T** Separated  
Employee subgroup **TR** Terminated



**Additional actions**


Start date	Act.	Action type	ActR	Reason f. action

We will make various changes to this screen and they are reflected in the screen shot above.

Field Name	Description	R/O/C	User Action/Values
Action type	Rehire	R	Will default in
Reason for action	The reason the action is being performed	R	You may enter the action directly or use the dropdown menu to select.
Employment	User defined	R	Field will default in Active
Position	User defined	R	<b>Will default all 9s. Clear and enter position number or select from the drop down.</b>
Personnel Area	The assigned area of the position within the organization	R	<b>Clear the field before selecting</b> <b>Will default from the position number selected</b>
Employee Group	The group that the employee will be assigned to	R	<b>Clear the field before selecting</b> <b>Will default from the position number selected</b>
Employee Subgroup	The assigned subgroup for the employee	R	<b>Clear the field before selecting</b> <b>Use drop down arrow to select.</b>

## Other Personnel Actions

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to save your entries.

Press the Save icon .

You will now see the next infotype in the rehire action series the Infotype 0002 – Copy Personal Data

**Copy Personal Data**

Infotype Edit Goto Extras System Help

Personnel no. [ ] Name [ ]

EE group 5 NF Pers. area 1019 MWR NS MAYPORT

EE subgroup FT Reg Full Time SSN [ ] Status Active

Start 03/01/2003 To 12/31/9999

**Name**

Form of addr [ ]

Last name SIMPSON

First name ERICA

Mid. name MARGARETT

2nd title [ ]

Suffix [ ]

Name ERICA SIMPSON

**HR data**

SSN [ ]

Birth date 06/17/1977

Comm. lang. English



Mar. status Marr.

**Gender**

☒ Female ☐ Male ☐ TBD

We have made no changes to infotype record so we validate the entries and save the record by clicking on the Save icon .

If there are any changes to any of these infotypes, make the changes and/or additions. If there are none and the information as stated on the infotype remains the same:

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to save your entries.

Press the Save icon .

The next infotype is 0001 – Copy Organizational Assignment as shown below.

**Copy Organizational Assignment**

Infotype Edit Goto Extras System Help

Org Structure

Personnel no.  5 Name  **Hasting** Status  Active  
 EE group  **T** Separated Personnel ar  **1287** Northwest Region MWR  
 EE subgroup  **TR** Terminated SSN   
 From  **03/01/2001** to  **01/01/2002**

**Enterprise structure**



CoCode  **1287** MWR COMNAVREG, N.W.  
 Pers. area  **1287** Northwest Region MWR Subarea  **1287** West Sound  
 Cost ctr  **967** WS JANITORIAL 1287

**Personnel structure**

EE group  **1** NA Payr. area  **BA** NW Region  
 EE subgroup  **FT** Reg Full Time

**Organizational plan**



Percentage  **100.00** Assignment  
 Position  **10003961** Cust Wkr  
 Job key  **10001057** Custodial Worker  
 Exempt  **N** NA 3566 02  
 Org. unit  **10003256** Cust Srvcs  
 Org. key  **1173** Custodial Services

Validate all the entries on the screen and then: Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

Press the Save icon .

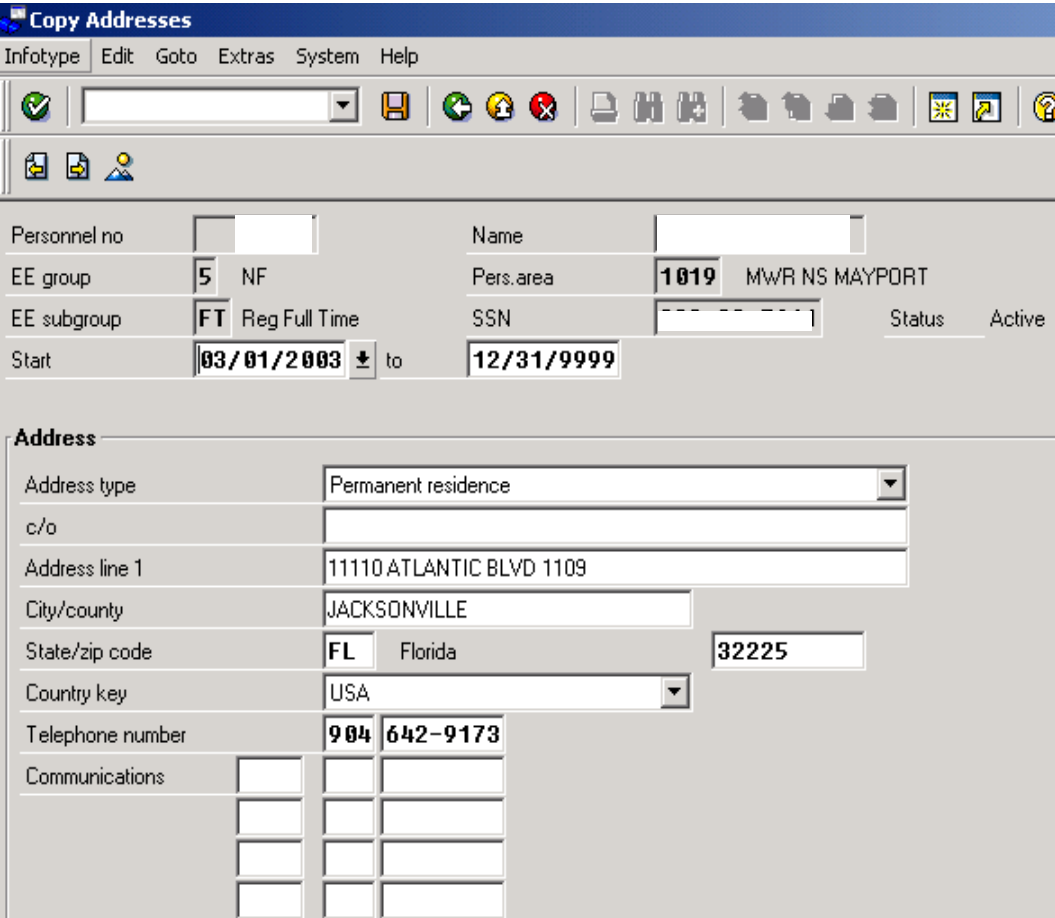
## Other Personnel Actions

As you go through the infotypes during the rehire process, validate the entries for accuracy, make the changes and/or additions as needed and:

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

Press the Save icon .

The next infotype 0006 – Copy Addresses appears.





Personnel no		Name	
EE group	5 NF	Pers.area	1019 MWR NS MAYPORT
EE subgroup	FT Reg Full Time	SSN	
Status	Active		
Start	03/01/2003	to	12/31/9999

<b>Address</b>			
Address type	Permanent residence		
c/o			
Address line 1	11110 ATLANTIC BLVD 1109		
City/county	JACKSONVILLE		
State/zip code	FL	Florida	32225
Country key	USA		
Telephone number	904	642-9173	
Communications			


Again, there have been no changes in this information so we follow the same steps as before.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to save your entries.

Press the Save icon .

The next screen to appear is the Tax Area. Always select the **state of residence** on this pop up window.

Tax area	Description	PostalCode	PostalCode	Start date	End date
FED	Federal	00000-0001	99999-9999	01/01/1980	12/31/9999
TN	State of Tennessee	37000-0000	38599-9999	01/01/1980	12/31/9999

Double click on state name or click once, then select the green check . This populates the tax area field on the next screen, Create Residence Tax Area.

Personnel no: [ ] Name: KATHLEE... Status: Active

EE group: 5 NF Personnel ar: 7900 Headquarters

EE subgroup: FT Reg Full Time SSN: [ ]

From: 03/20/2001 to 12/31/9999


**Resident data**

Tax area: TN

**Tax Authorities in Area**

Tax authority	Tax Level


Press the Enter icon . You will get the Record Delimited warning message. Press

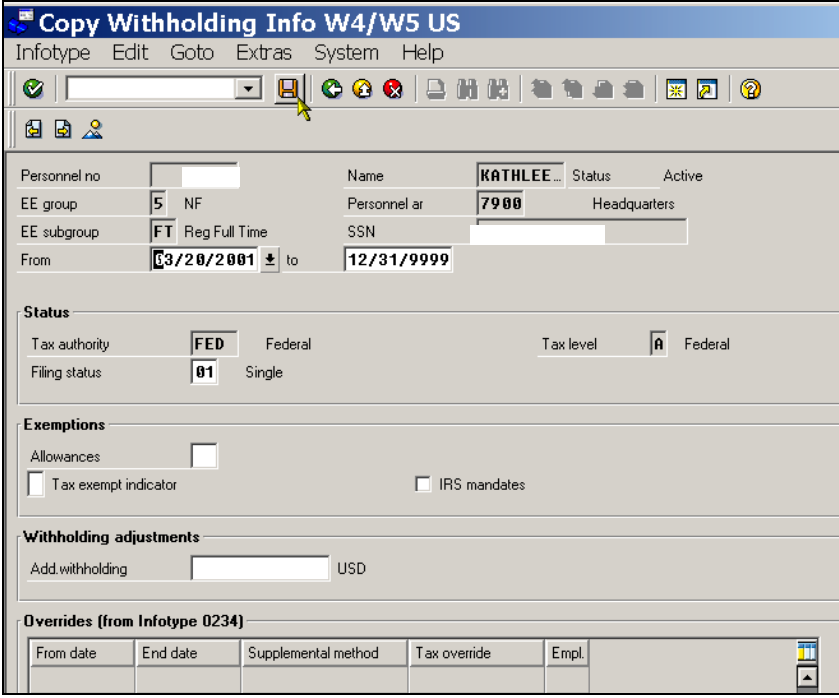
the Enter icon  again. You will be warned to Save your entries.

Press the Save icon .

## Other Personnel Actions



The next infotype is 0210-Withholding info W4/W5 US.

Enter the correct information and press the Enter icon  and save.



From date	End date	Supplemental method	Tax override	Empl.

We have received a new W4 from the rehired employee and must make the changes to infotype 0210 – Withholding Info W4/W5 US. In this case it is for the Federal Withholding as indicated on the screen.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

Press the Save icon .

The next infotype in the process of rehiring an employee appears on the next page.

## This is infotype 0041 – Copy Date Specifications

Date Specifications	
Date type	Date
01 Activity Start Date	06/12/2002
03 Service Comp Date	09/27/1997
06 Ret Plan Eligibility	06/12/2002

Date type	Date
02 Date of Rehire	06/19/2002
04 Civilian Service	09/27/1997
07 NAFI Comp Date	06/01/2000

Update any fields necessary using the guidelines outlined below.

**Date type 02 *Date of Rehire***, will populate with the rehire action date.

**Date type 01 *Activity Start Date***, which is the first date of employment at the current activity. This date populates from the new hire action. The date will need to be changed when an employee transfers to a new payroll area, i.e. Mayport to Seattle or MWR to VQ.



**Date type 04 *Civilian Service Date***, which is the Comp date minus the active duty military time. In most cases, this will be the same as the Original hire date.

**Date type 03 *Service Computation Date***, the date either actual or constructed by crediting service, used to determine annual leave accrual. For an employee with no creditable NAFI or military service, the service comp date is the effective date of the employee's first Federal civilian appointment. For an employee with prior creditable service, the service comp date is constructed by totaling the days, months, and years of the employee's creditable civilian and military service and subtracting that total from the effective date of the employees most recent appointment. When service credit of 4 years, 3 months, and 3 days is subtracted from the date, 1998-10-12, the result is 1994-07-09. Thus, the service comp date will then be 07-09-1994.

**Date type 06 *Ret Plan Eligibility*** is used for benefit retirement plan eligibility. This date will populate from the rehire action and must be changed to the correct date.

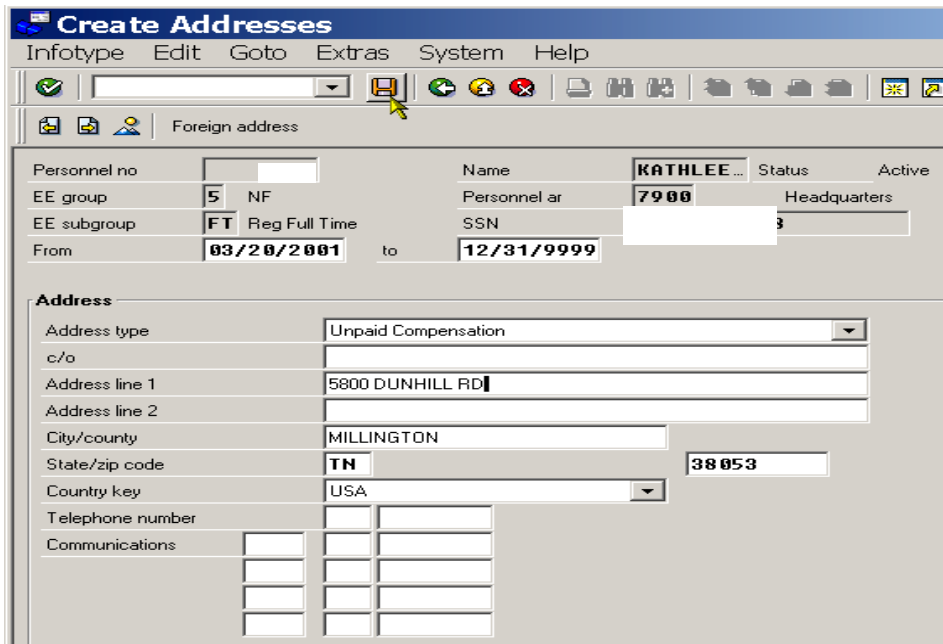


**Date type 07 NAFI Computation Date**, the date either actual or constructed by crediting service, used to determine Regular NAFI employment length. For an employee with prior creditable service, The NAFI computation date is constructed by totaling the days, months, and years of the employee's creditable NAFI service and subtracting that total from the employee's most recent appointment.


Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

Press the Save icon .

The next infotype is Create Addresses – Unpaid Compensation.





Personnel data		Address	
Personnel no.		Name	KATHLEE...
EE group	5 NF	Status	Active
EE subgroup	FT Reg Full Time	Personnel ar	7900
From	03/20/2001	SSN	
to	12/31/9999	Headquarters	
<b>Address</b>			
Address type		Unpaid Compensation	
c/o			
Address line 1		5800 DUNHILL RD	
Address line 2			
City/country		MILLINGTON	
State/zip code		TN 38053	
Country key		USA	
Telephone number			
Communications			

After making entries, press the Enter icon  to validate. You will be warned to Save your entries.

Press the Save icon .


Validate entries by selecting , and save this screen.

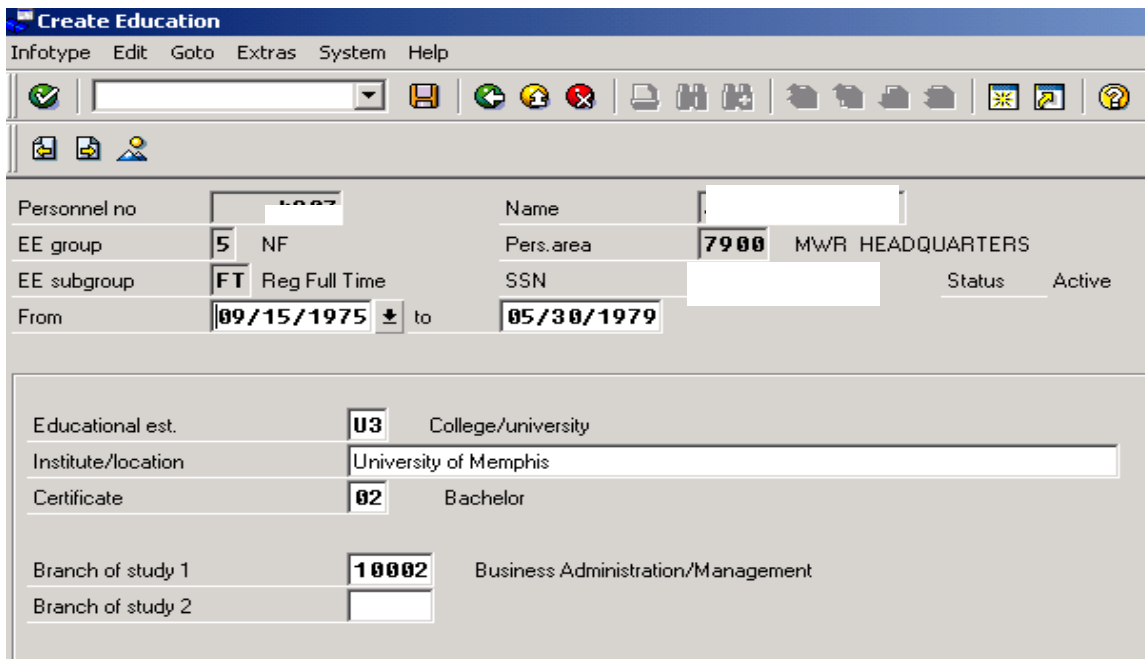
The next screen is Copy Residence Status.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

Press the Save icon .

## Other Personnel Actions

The next screen is Create Education. If no entries are necessary, click the  icon. If Education data is available, make entries in all required fields, and save your entries.



Personnel no.		Name	
EE group	5 NF	Pers.area	7900 MWR HEADQUARTERS
EE subgroup	FT Reg Full Time	SSN	
From	09/15/1975	to	05/30/1979
Status	Active		
Educational est.	U3	College/university	
Institute/location	University of Memphis		
Certificate	02	Bachelor	
Branch of study 1	10002	Business Administration/Management	
Branch of study 2			

The next infotype to appear is the mandated DOD/MWR information type.

## Infotype 9001 – DOD/MWR Specific Data

**Copy DOD / MWR Specific Data**

Infotype Edit Goto Extras System Help

From **04/10/2002** to **12/31/9999**

**Locale Information**

DOD NAFI organization code **NU22** Navy NAFI  
 Duty station location **471660057** Millington, TN  
 NAF personnel office identifier **79000** PERS-65 Millington, TN  
 DOD MWR activity code **48** None of the above

**USA Funding Under MOA**

USA indicator **N** Not covered under USA MOA

**Miscellaneous**

Welfare to work hire code **B** Hired on or after March 8, 1997 - Box B on OPM Form 1635  
 DOD dependent-sponsor relationship **ZZ** Not applicable. Not a dependent of a sponsor.  
 Person designator type code **S** Social security number  
 Off duty military code **N** No; not a military member on active duty  
 Source of recruitment

**Union eligibility**

Bargaining unit eligibility code **Y** Non Supervisory  
 Bargaining unit member status **N** Not Member of Bargaining Unit

**Retirement Information**

Retirement plan code **Z** None  
 Retirement certificate number  
 Portability of retirement election **Z** None of the above  
 Appr. fund severance pay entitled **N** Not applicable  
 Portability of benefits status code **N** Not covered

**Position Information**



Position sensitivity **1** Critical Sensitive  
 Supervisor position **N**  
 Local PD number **12456**

**ADP Information**

ADP company code  
 ADP file number **000000**

**Miscellaneous Notes**

**ADP Company code** and **ADP file number** must be blanked out. The information will populate overnight after the IDOCs have been processed.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

The screen will roll to the next infotype 9005 – *Create Kronos Information*  
**9005 details will look like this for a Kronos Employee:**

The screenshot shows the 'Create Kronos Information' window. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main form area contains the following fields:

Personnel no		Name	
EE group	5 NF	Pers.area	7900 MWR HEADQUARTERS
EE subgroup	FT Reg Full Time	SSN	
Start	07/01/2003 to	12/31/9999	Status Active

**Kronos Information**

Kronos Badge Number	6894516	<input type="checkbox"/> No Badge Necessary
Terminal Group	GLK_CDC	
Local Labor Level		
Person Type	1	TK Employee
Kronos logon		
Access Profile		
Labor Level Set		

A Kronos Employee punches in and out at a timekeeper terminal. This employee requires a Badge Number and Terminal Group and the Person Type is 1 for TK Employee.

**9005 details will look like this for a Timekeeper (TK) Employee:**

The screenshot shows the 'Create Kronos Information' window for a Timekeeper (TK) Employee. The top menu bar and toolbar are the same as the previous screenshot. The main form area contains the following fields:

Personnel no		Name	KATHLEEN DECENT
EE group	5 NF	Pers.area	7900 MWR HEADQUARTERS
EE subgroup	FT Reg Full Time	SSN	
Start	07/01/2003 to	12/31/9999	Status Active

**Kronos Information**

Kronos Badge Number	6894516	<input type="checkbox"/> No Badge Necessary
Terminal Group	GLK_CDC	
Local Labor Level		
Person Type	1	TK Employee
Kronos logon	GLK_KDECENT	
Access Profile	TIMEKEEPER	
Labor Level Set	GLK CDC 1991 AND 3110	

Timekeeper employees edit timecards and schedules, but cannot sign off. A Kronos Timekeeper Employee may punch in and out at a timekeeper terminal, requiring a Badge Number and Terminal Group or they could be Pay From Schedule or Timestamp Employee. A Pay From Schedule or Timestamp Employee would not require a Badge Number or Terminal Group.

The Person Type is 1 for TK Employee. The Kronos Logon is always in all caps and is the three alpha characters for your region followed by an underscore and the first letter of the first name and up to seven letters of the last name. The Access Profile is Timekeeper. The Labor Level Set is only used for managers to tell Kronos which group of employees the manager will administer.

9005 details will look like this for a Manager:

Personnel no	07	Name	WATKIN, ROBERT		
EE group	5 NF	Pers. area	7900	MWR HEADQUARTERS	
EE subgroup	FT Reg Full Time	SSN		Status	Active
Start	01/01/2001	to	12/31/9999	Chng	09/17/2002 HQ_P657D9

<b>Kronos Information</b>	
Kronos Badge Number	6598721 <input type="checkbox"/> No Badge Necessary
Terminal Group	GLK_AUTO
Local Labor Level	
Person Type	5
Kronos logon	GLK_KDECENT
Access Profile	MANAGER 2
Labor Level Set	GLK_AUTO

A Kronos Manager may punch in and out at a timekeeper terminal, requiring a Badge Number and Terminal Group or they could be Pay From Schedule or a Timestamp Employee. A Pay From Schedule or Timestamp Employee would not require a Badge Number or Terminal Group.

The Person Type can be 4 for a manager whose hours are recorded via timestamp or 5 for a manager who punches in and out at a timekeeper terminal or is Pay From Schedule. The Kronos Logon is always in all caps and is the three alpha characters for your region followed by an underscore and the first letter of the first name and up to seven letters of the last name. The Access Profile is Manager 2. The Labor Level Set is only used for managers to tell Kronos which group of employees the manager will administer.

A GS manager who will not be entering time in WorkForce Central, but will manage employees will be a 5 for Person Type and will have an Access Profile of Manager 1, Manager 2, or Timekeeper. See description below.

#### Kronos Function Access Profile

<b>Access Profile</b>
EMPLOYEE
MANAGER 1
MANAGER 2
PAYROLL
TIMEKEEPER

Employee – for Time Stamp employees only.

Manager 1 – will be able to approve timecards, but cannot sign off.

Manager 2 – will be able to approve and sign off timecards.

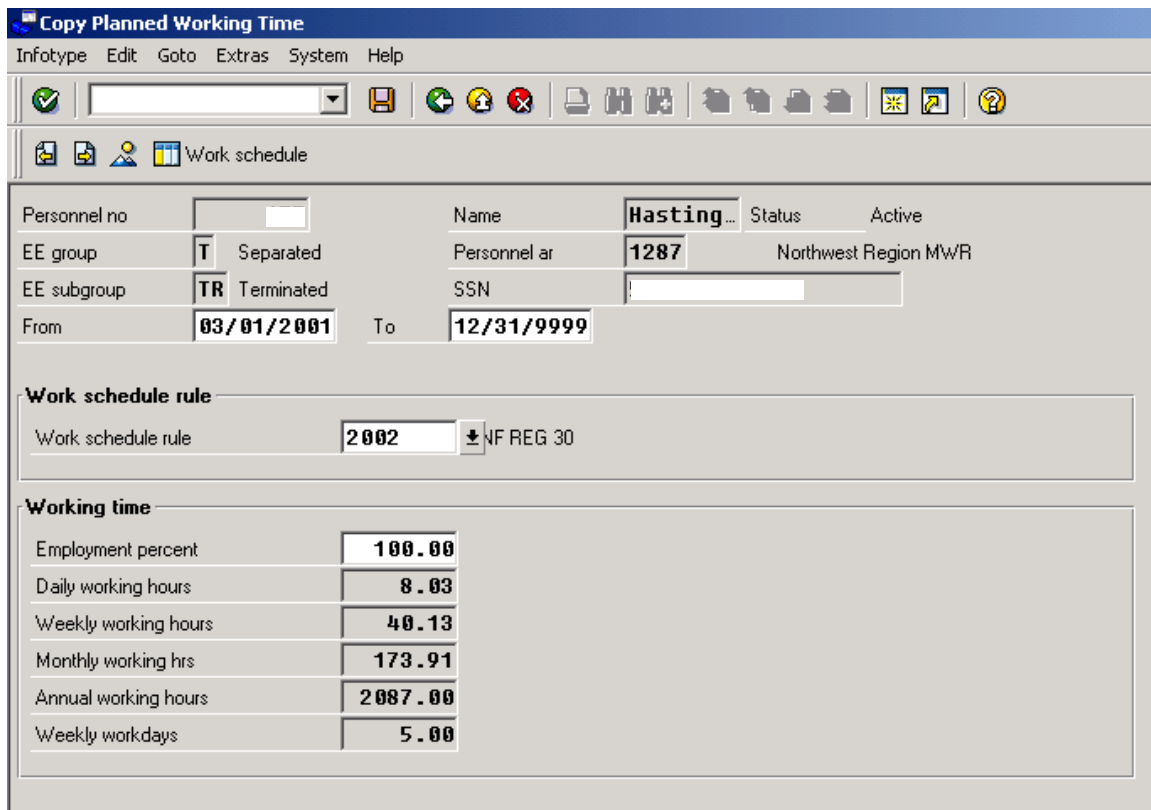
Payroll – used for payroll employees.

Timekeeper – will be able to edit timecards, schedules, but cannot sign off. Press the

Enter button and Save  the transaction.

## Other Personnel Actions

The next infotype in the process 0007 – Copy Planned Working Time appears





Personnel data	
Personnel no	
Name	Hasting...
Status	Active
EE group	T Separated
Personnel ar	1287
EE subgroup	TR Terminated
SSN	
From	03/01/2001
To	12/31/9999

Work schedule rule	
Work schedule rule	2002
	NF REG 30

Working time	
Employment percent	100.00
Daily working hours	8.03
Weekly working hours	40.13
Monthly working hrs	173.91
Annual working hours	2087.00
Weekly workdays	5.00

The only entry required is the Work Schedule Rule. In the example it was **2002 – NF REG 30**. Select for the dropdown.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

Press the Save icon .

**Create Basic Pay**

Infotype Edit Goto Wage types Extras System Help

Salary amount Payments and deductions

Personnel no  Name  Status

EE group  Separated Personnel ar  Northwest Region MWR

EE subgroup  Terminated SSN

From  to

**Pay scale**

Reason  No reason Cap.util.lvl

Type  Navy MWR WkHrs/period  Bi-weekly



Area  AC 141

Group  Level  Annual salary  USD

Wage	Wage type name	Op	Amount	Currenc	Inc	Ad	Number	Unit
1010	Hourly Rate - MWR		8.75	USD	I	<input checked="" type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		

IV  -   USD

We have filled in the fields required on this infotype 0008 – Create Basic Pay  
 We entered the group, the level and the hourly rate of pay.

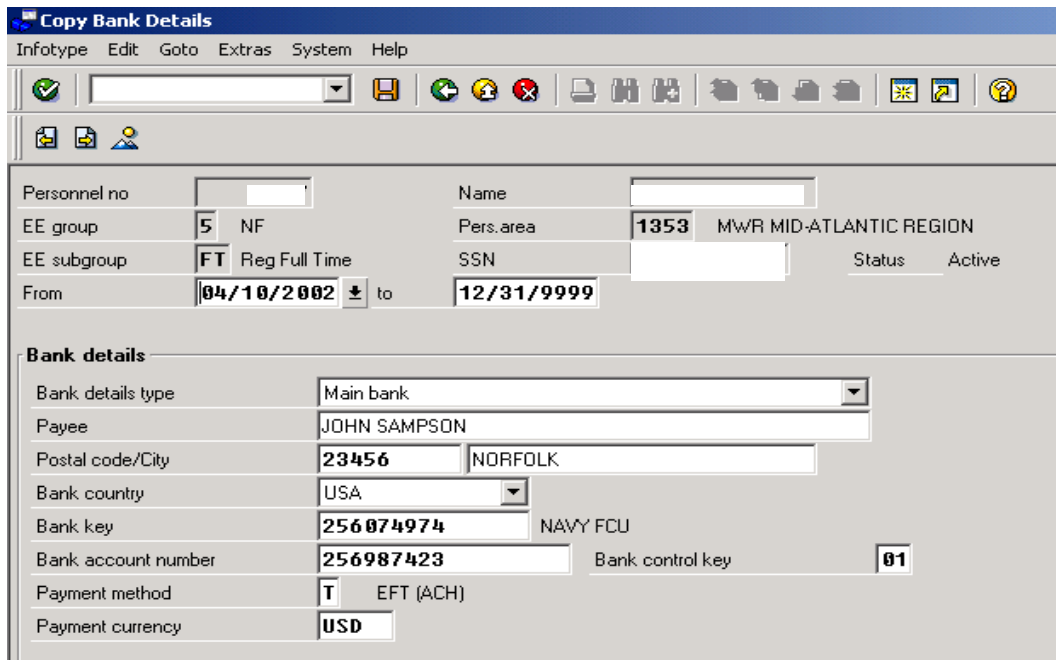
Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

Press the Save icon .



## Other Personnel Actions

The screen will roll to the next infotype 0009 – Copy Bank Details



**Copy Bank Details**

Infotype Edit Goto Extras System Help

Personnel no: [ ] Name: [ ]

EE group: 5 NF Pers.area: 1353 MWR MID-ATLANTIC REGION

EE subgroup: FT Reg Full Time SSN: [ ] Status: Active

From: 04/10/2002 to: 12/31/9999

**Bank details**

Bank details type: Main bank

Payee: JOHN SAMPSON

Postal code/City: 23456 NORFOLK

Bank country: USA

Bank key: 256074974 NAVY FCU


Bank account number: 256987423 Bank control key: 01

Payment method: T EFT (ACH)

Payment currency: USD

**Bank details** data are used by the automatic employee vendor creation program in accounts payable. Make any changes necessary and save.

Field Name	Description	R/O/C	User Action/Values
<b>Bank Details Type</b>	Type of bank for this Employee	R	Will default to main bank
<b>Payee</b>	Employee's name	R	Will default
<b>Postal code/City</b>	Zip code/City	R	Will default
<b>Bank Country</b>	Bank Country	R	Will default USA
<b>Bank Key</b>	The name of the bank the funds are to be deposited into	R	Enter the employee's bank deposit transit/ABA number from direct deposit sign up form.
<b>Bank Control Key</b>	The type of account	R	Must be 01 Checking or 02 Savings
<b>Bank Account Number</b>	Account number of the account to be deposited into	R	Enter the employee's bank account number.
<b>Payment Method</b>	EFT or a check for the payment?	R	Will default to "T" for direct deposit. Change to "C" only if waiver from MWR HQ is approved.
<b>Payment Currency</b>	Payment Currency	R	Will default to USD

Press the Enter button and Save  the transaction. The screen will roll to the next infotype 0006 – Create Addresses, subtype 2 Address, Emergency Contact




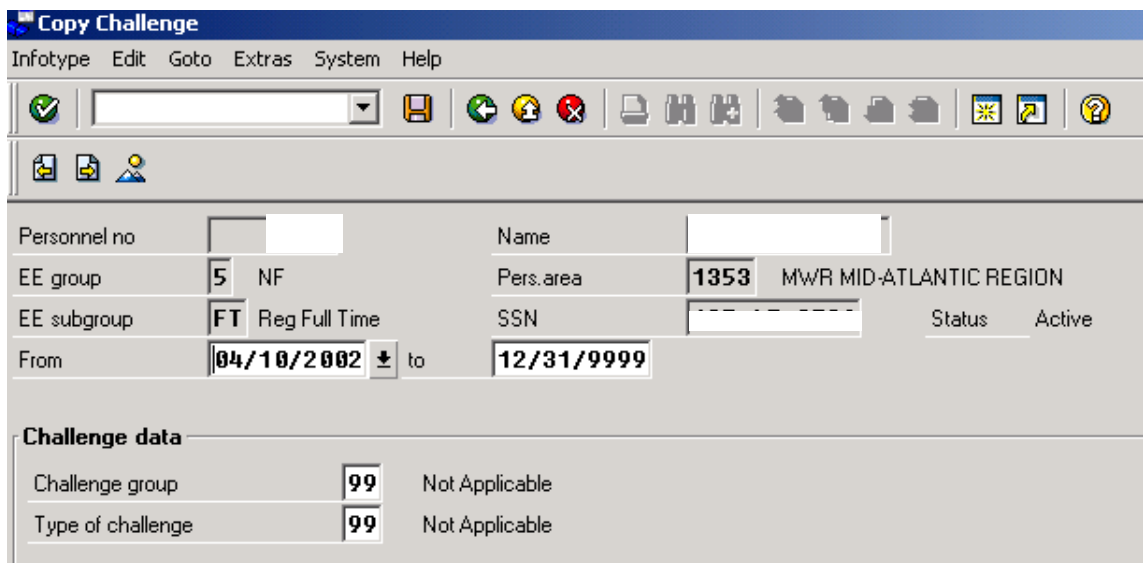
**NOTE:** According to the United States Postal Service Sorting Facility all names and addresses must be entered into the system using upper case letters (ALL CAPS) and NO punctuation except the hyphen between the first five numbers in a Zip code and the last four.

Field Name	Description	R/O/C	User Action/Values
Address type	Type of Address	R	Defaults Emergency Contact – Who to call
C/O	In care of	R	Enter the emergency contact's first and last name (and relationship if available)
Address	Street name and number	R	Must populate this field, can enter "address unknown"
City/County	City	R	Enter the contact's city. If unknown, use the employee's.
State/Zip Code	State/Zip Code	R	Enter the contact's state and zip. If unknown, use the employee's
Country key	The contact's country key	C	Will default to USA

## Other Personnel Actions

<b>Telephone Number</b>	Telephone	R	Contact's telephone number
<b>Communications</b>	Additional numbers	O	May be used for additional contact phone numbers.

Press the Enter button and Save  the transaction. The screen will roll to the next infotype 0004 – Create Challenge.



**Copy Challenge**

Infotype Edit Goto Extras System Help

Personnel no: [ ] Name: [ ]

EE group: 5 NF Pers.area: 1353 MWR MID-ATLANTIC REGION

EE subgroup: FT Reg Full Time SSN: [ ] Status: Active

From: 04/10/2002 to: 12/31/9999

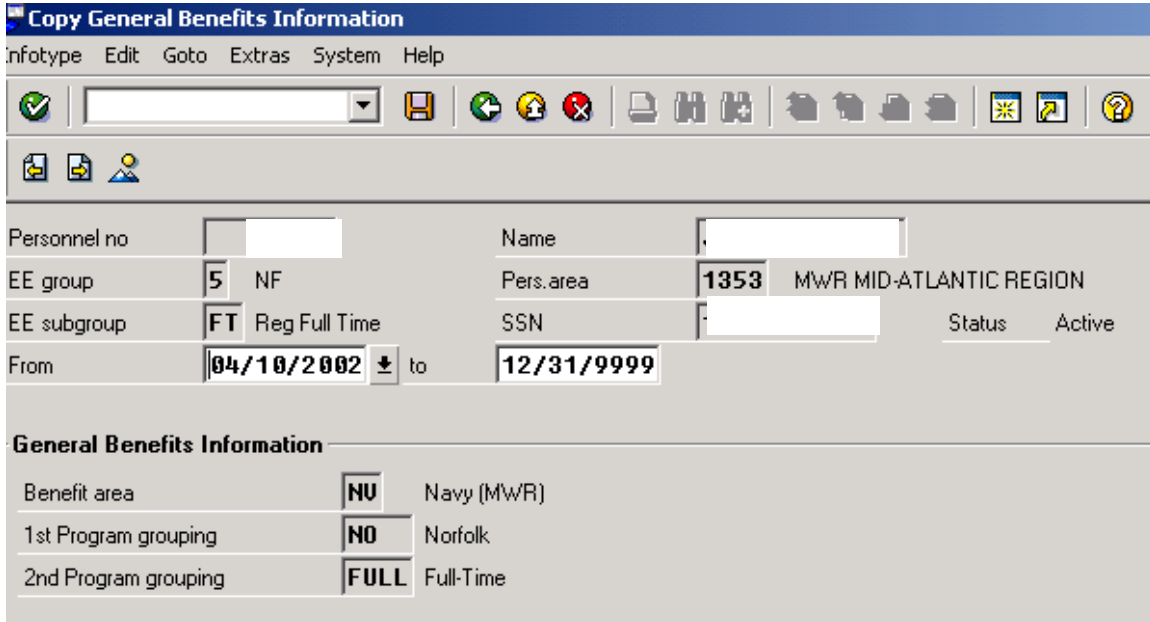
**Challenge data**

Challenge group: 99 Not Applicable

Type of challenge: 99 Not Applicable

**This screen must be completed! Enter “99” in both fields if challenge not applicable.**

The next screen to appear is Copy General Benefits Information.



**Copy General Benefits Information**

Infotype Edit Goto Extras System Help

Personnel no: [ ] Name: [ ]

EE group: 5 NF Pers.area: 1353 MWR MID-ATLANTIC REGION

EE subgroup: FT Reg Full Time SSN: [ ] Status: Active

From: 04/10/2002 to: 12/31/9999



**General Benefits Information**

Benefit area: NU Navy (MWR)

1st Program grouping: NO Norfolk

2nd Program grouping: FULL Full-Time

Infotype 0171 – Copy General Benefits Information requires no entry, just validation of the information and saving it.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

Press the Save icon .



The final infotype to appear in the rehire process is infotype 0378 – Create Adjustment Reasons. This screen is shown here.

## Other Personnel Actions

**Create Adjustment Reasons**

Infotype Edit Goto Extras System Help

Personnel no: 7 Name:   
EE group: 5 NF Pers.area: 1353 MWR MID-ATLANTIC REGION  
EE subgroup: FT Reg Full Time SSN: Status: Active  
From: 04/10/2002 to: 05/11/2002  
Benefit area: Navy (MWR)  
Adjustment reason: Rehire

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

Press the Save icon .

The process is complete and this can be verified by using transaction code PA20 to inspect all the infotypes processed during the rehire.

Print a Personnel Action Report, and continue processing rehire with Benefit Enrollment.



Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

<b>Personnel Actions</b>																																											
HR Master Data   Edit   Goto   Extras   Utilities   Settings   System   Help																																											
	<input type="text"/>																																										
Personnel no.	<input type="text" value="1 - ."/>																																										
Name	<input type="text" value="f"/>																																										
EE group	<input type="text" value="4"/> CC	Pers.area	<input type="text" value="1019"/> Mayport																																								
EE subgroup	<input type="text" value="CG"/> Flex Continuing																																										
From	<input type="text" value="02/02/2001"/>																																										
<table border="1"> <thead> <tr> <th>Action type</th> <th>Personnel ar</th> <th>EE group</th> <th>EE subgroup</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/> Change in Position</td><td></td><td></td><td></td></tr> <tr><td><input checked="" type="checkbox"/> Multiple Position Assignment</td><td></td><td></td><td></td></tr> <tr><td><input type="checkbox"/> Separation</td><td></td><td></td><td></td></tr> <tr><td><input type="checkbox"/> Rehire</td><td></td><td></td><td></td></tr> <tr><td><input type="checkbox"/> Leave of Absence</td><td></td><td></td><td></td></tr> <tr><td><input type="checkbox"/> Return from Leave of Absence</td><td></td><td></td><td></td></tr> <tr><td><input type="checkbox"/> Adjustment in Pay</td><td></td><td></td><td></td></tr> <tr><td><input type="checkbox"/> Retirement</td><td></td><td></td><td></td></tr> <tr><td><input type="checkbox"/> External Hire</td><td></td><td></td><td></td></tr> </tbody> </table>				Action type	Personnel ar	EE group	EE subgroup	<input type="checkbox"/> Change in Position				<input checked="" type="checkbox"/> Multiple Position Assignment				<input type="checkbox"/> Separation				<input type="checkbox"/> Rehire				<input type="checkbox"/> Leave of Absence				<input type="checkbox"/> Return from Leave of Absence				<input type="checkbox"/> Adjustment in Pay				<input type="checkbox"/> Retirement				<input type="checkbox"/> External Hire			
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<input type="checkbox"/> Retirement																																											
<input type="checkbox"/> External Hire																																											

## Other Personnel Actions

Field Name	Description	R/O/C	User Action/Values
<b>Personnel Number</b>	The individual Personnel Number assigned to each employee	R	Enter the Personnel number, if known, or use the dropdown menu to select.
<b>From</b>	The FROM date	R	Enter the beginning date of the multiple position assignment.
<b>Action Type</b>	The types of action that can be performed	R	Select the Multiple Position action line to highlight.

Select the Execute icon



The screen will roll to infotype 0000 – Copy Actions

**Copy Actions**

Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.no. [ ]

Name [ ]

EE group **4** CC Personnel ar **1819** Mayport

EE subgroup **CG** Flex Continuing SSN [ ]

From **02/02/2001** to **12/31/9999**

**Personnel action**

Action type Multiple Position Assignment

Reason for action **01** Multiple Position Assignment

**Status**

Employment Active

**Organizational assignment**



Position [ ]


Personnel area **1819** Mayport

Employee group **4** CC

Employee subgroup **CG** Flex Continuing

Field Name	Description	R/O/C	User Action/Values
Action type	Multiple Position	R	Will default from previous screen
Reason for action	The reason for the action being performed	R	Select the appropriate reason code for the Multiple Position Action using the dropdown menu.
Employment	User defined	R	Will default in. Cannot be changed
Position Number	User defined	R	<b>Blank out the position number in this field.</b>
Personnel Area	The assigned area of the organization of the position	R	Will default in and will represent the MWR location to which the original position has been assigned.
Employee Group	The group of employees that the employee will be assigned to.	R	Will default from the original position and represents the employment category, i.e. NF, NA, CC, etc.
Employee Subgroup	The assigned subgroup of the employee.	R	Leave the information as defaulted in. <b>This is for flexible employees. For working retirees change to RW.</b>

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

Press the Save icon  to save the transaction and to open the next infotype record.



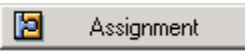
## Other Personnel Actions

Infotype 0001 – Copy Organizational Assignment will show.

Field Name	Description	R/O/C	User Action/Values
<b>Co Code</b>	Company Code	R	Will default based on position
<b>Pers Area</b>	Personnel Area	R	Default in based on the entries made to the Infotype 0000 - Actions.
<b>Cost Ctr</b>	Cost Center	R	Will default blank and will be populated after the multiple positions are created.
<b>Subarea</b>	Personnel area	R	Default in based on the entries made to the Infotype 0000 - Actions.
<b>EE Group</b>	Employee Group	R	Default in based on the original entries made to the Infotype 0000 - Actions.
<b>EE Subgroup</b>	Employee Subgroup	R	Default in based on the original entries made to the Infotype 0000 - Actions.
<b>Payr Area</b>	Payroll Area	R	This field will default in.

<b>Percentage</b>	The percentage that the employee is assigned to the position number	R	This field will default to 100% <b>It must be blanked out!</b>
<b>Assignment button</b>	The percentage for each position	R	Allows for entering the % that the employee will be assigned to each position.

Click on the Assignment button



**Copy Organizational Assignment**

☒ Position assignments

Future assignment | Current assignment

	Position	Name	Percent	Start date	End date	Operation
	10002453	Bartender Supervisor	100.00	01/01/2001	02/07/2002	Delimit
	10002453		30.		12/31/9999	

Assign Delimit

☐ No assignment ☐ Organizational unit

99999999 Integration: default position

Transfer assignment Cancel assignment

The window as shown above is one example of the Copy Organizational Assignment Action screen.

**NOTE:** The first line in the window will show the current assignment and will be delimited.

The first line with the current position will be grayed out. We now must correct the assignment to reflect the multiple positions. Re-enter position number, enter 30.00 in the percent field and the end date of 12/31/9999.

For the multiple position, we need to add another line in the window to enter this information.

**Copy Organizational Assignment**

☒ Position assignments

Future assignment    Current assignment

Position	Name	Percent	Start date	End date	Operation
10002235	Secretary	100.00	03/01/2003	03/04/2003	Delimit
10002235	Secretary	50.00	03/05/2003	12/31/9999	Assign
10002258	Rec Aide/Lifeguard	50.00	03/05/2003	12/31/9999	Assign

Assign    Delimit   

☐ No assignment    99999999    Integration: default position

☐ Organizational unit   

Continue    Cancel assignment

Click the **Insert Line button** (the page with the plus sign on it) to add another line to the window. Enter position number **10003654** in the first field. Enter **70.00** in the percent field. Change the End date to **12/31/9999**.

Click the **Assign button** **Assign**. This puts the green check mark on the third row in the Operation column.

Click on the **Continue Icon** **Continue**. You will receive the warning shown, click the green check mark and you will be taken back to the Copy Organizational Assignment infotype.

You will be prompted to create a vacancy for the original position (if there was one).

Save the transaction by clicking the **SAVE icon** . Notice that the Copy Organizational Assignment screen shows only one of the multiple positions.

The system will now show the 0008 – Create Basic Pay infotype.

**Create Basic Pay**

Infotype Edit Goto Wage types Extras System Help

Salary amount Payments and deductions

Personnel no. [redacted] Name [redacted]

EE group 3 NS Pers.area 1019 MWR MAYPORT

EE subgroup FT Reg Full Time SSN [redacted] Status Active

From 02/08/2002 to 12/31/9999

**Pay scale**

Reason 09 Multiple position Cap.util.lvl 100.00

Type 01 Navy MWR WkHrs/period 80.26 Bi-weekly

Area 02 AC 159

Group NF 02 Level 00 Annual salary 17,737.00 USD

Wage	Wage type name	Op	Amount	Currenc	Inc	Ad	Number	Unit
1010	Hourly Rate - MWR		8.50	USD		<input checked="" type="checkbox"/>		
1013	Hourly Rate 2		7.50	USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		


10 02/15/2002 - 12/31/9999 8.50 USD

We have entered the grade of the multiple positions and the Hourly rates. You will need to enter a reason code -choose one from the drop down menu for multiple position group. **Always use the drop down arrow to find correct selection and double click on it to enter.**


Field Name	Description	R/O/C	User Action/Values
<b>Reason Code</b>	2 digit code	R	Use drop down arrow to select reason code for multiple position
<b>Group</b>	Personnel group	R	Must be original position group
<b>Wage type</b>	Rate code	R	Enter 1013 for multiple position type
<b>Amount</b>	Hourly pay rate	R	For the first position enter the hourly rate(s), for NF's and CC's – all others will populate when user hits enter. Can override for save pay. The second position must also have an hourly rate. Enter the hourly rate.

Press the Enter button. Press Enter again to validate the entries.




## Other Personnel Actions

Press the Save icon  to save the transaction. The employee is now created with Multiple Positions in the system.



**NOTE:** To view multiple positions, use PA20 to display HR Master Data, enter personnel number, select Organizational Assignment, and the  icon. Both positions will be displayed.

Organizational Assignment			
Person	SIMPSON 00001845		
Organizational unit	Admin/Mil Su 10001737		
Position	NF 0318 02	10002235	
Job	NF 0318 02	10001308	
Organizational unit	FHSD 10002139		
Position	NF 1101 02	10005268	
Job	NF 1101 02	10001374	







## End of Multiple Position Assignment

Menu Path: HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS  
Transaction code: PA40

This procedure describes the steps necessary to process the end of a multiple position assignment through the SAP Human Resources system. We have highlighted the Multiple Position Assignment line in the Action type section on the Personnel Actions

screen and click the Execute icon .


**Personnel Actions**  
HR Master Data Edit Goto Extras Utilities Settings System Help

Personnel no.    
Name   Status **3** Active  
EE group **5** NF Pers. area **1019** MWR NS MAYPORT  
EE subgroup **FT** Reg Full Time Cost center **800** OCEAN BREEZE C...  
From **03/07/2003**

Action type	Personnel ar	EE group	EE subgroup
<input type="checkbox"/> New Hire			
<input type="checkbox"/> Change in Position			
<input checked="" type="checkbox"/> Multiple Position Assignment			
<input type="checkbox"/> Separation			
<input type="checkbox"/> Retirement			
<input type="checkbox"/> Rehire			
<input type="checkbox"/> Leave of Absence			
<input type="checkbox"/> Return from Leave of Absence			
<input type="checkbox"/> Adjustment in Pay			
<input type="checkbox"/> Annual Appraisal			

Screen: Copy Actions

Field Name	Description	R/O/C	User Action/Values/Comments
<b>Reason for Action</b>	The reason the action is being performed.	R	Select 03-End of Multiple Position Assignment.
<b>Position</b>	Position number	R	This will default with the position number, <b>BLANK IT OUT.</b>

Click on the assignment button  Assignment

The following pop up box will appear.

**Copy Organizational Assignment**

☒ Position assignments

Future assignment | Current assignment

	Position	Name	Percent	Start date	End date	Operation
<input type="checkbox"/>	10001089	Maintenance Worker	60.00	03/05/2003	03/06/2003	Delimit
<input type="checkbox"/>	10002565	Waitress	40.00	03/05/2003	03/06/2003	Delimit
<input type="checkbox"/>	10001089	Maintenance Worker	100.00	03/07/2003	12/31/9999	Assign

Assign Delimit

☐ No assignment 99999999 Integration: default position

☐ Organizational unit

Continue Cancel assignment

Both of the multiple positions have been delimited.

- Enter the position number for the new position.
- Enter 100.00 in the Percent field.
- Enter 12/31/9999 in the End Date field.
- Click on the Assign icon . This will put a green check next to the assign button.
- Click on continue .

You will be taken back to the Copy Organizational Assignment screen. Save the transaction by clicking on the save icon .

Infotype 0008- Create Basic Pay will now come up.



## Other Personnel Actions

**Create Basic Pay**

Infotype Edit Goto Wage types Extras System Help

Salary amount Payments and deductions

Personnel no. [ ] Name [ ]

EE group **1** NA Pers. area **1019** MWR NS MAYPORT

EE subgroup **CG** Flex Continuing SSN **086-68-3755** Status Active

Start **03/07/2003** to **12/31/9999**

**Pay scale**

Reason **09** Multiple position Cap. util. lvl **100.00**

Type **01** Navy MWR WkHrs/period **80.26** Bi-weekly

Area **02** AC 159

Group **NA 05** Level **02** Annual salary **0.00** USD

Wage	Wage type name	Op	Amount	Currenc	Inc	Ad	Number	Unit
<b>1010</b>	Hourly Rate - MWR		<b>8.84</b>	USD	<b>I</b>	<input checked="" type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		

Enter the Reason for action. Select the group and level from the dropdown. Hit enter to populate the hourly rate. Save.



## Process a Change in Position

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**  
Transaction code: **PA40**

### Process a Change in Position

This procedure describes the steps necessary to process a change in a position through the SAP Human Resources system. We have highlighted the Change in Position line in the Action type section on the Personnel Actions screen and we now click the Execute icon.



Action type	Personnel area	EE group	EE subgroup
New Hire			
<b>Change in Position</b>			
Multiple Position Assignment			
Separation			
Rehire			
Leave of Absence			
Return from Leave of Absence			
Adjustment in Pay			
Retirement			
External Hire			
External Separation			

Field Name	Description	R/O/C	User Action/Values/Comments
<b>Personnel number</b>	The individual Personnel Number assigned to each employee	R	Enter the Personnel Number, if known, or use the dropdown menu to select.
<b>From</b>	The From Date	R	Enter the beginning date of the Change in Position.
<b>Action Type</b>	The types of action that can be performed	R	Select the Change in Position action line to highlight.

*Screen: Copy Actions*

**Copy Actions**  
 Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.no.   
 Name   
 EE group  CC Personnel ar  Jacksonville  
 EE subgroup  Reg Full Time SSN   
 From  to

**Personnel action**  
 Action type   
 Reason for action

**Status**  
 Employment

**Organizational assignment**  
 Position  Ed Tech (CDC) GSE04  
 Personnel area  Jacksonville  
 Employee group  CC  
 Employee subgroup  Reg Full Time

**Additional actions**

Field Name	Description	R/O/C	User Action/Values/Comments
Action type	Action type	R	Will default “Change in Position”
Reason for Action	The reason for the action	R	Enter the reason for the action using the drop down arrow.
Employment	In the Status section	R	Will default to Active and it is not available for editing
Position	The current position number	R	Enter the new position number either directly, if known or use the drop down arrow.
Personnel Area	Will default from the previous position. <b>Blank it Out!</b>	R	Will default in the new Personnel Area upon pressing the Enter key after fields have been blanked out.
Employee Group	Will default from the previous position. <b>Blank it Out!</b>	R	Will default in the new Personnel Area upon pressing the Enter key after fields have been blanked out.
Employee Subgroup	Will default from the previous position. <b>Blank it Out!</b>	R	Blank out the information from the previous position .Use the drop down arrow to select the correct employee subgroup.

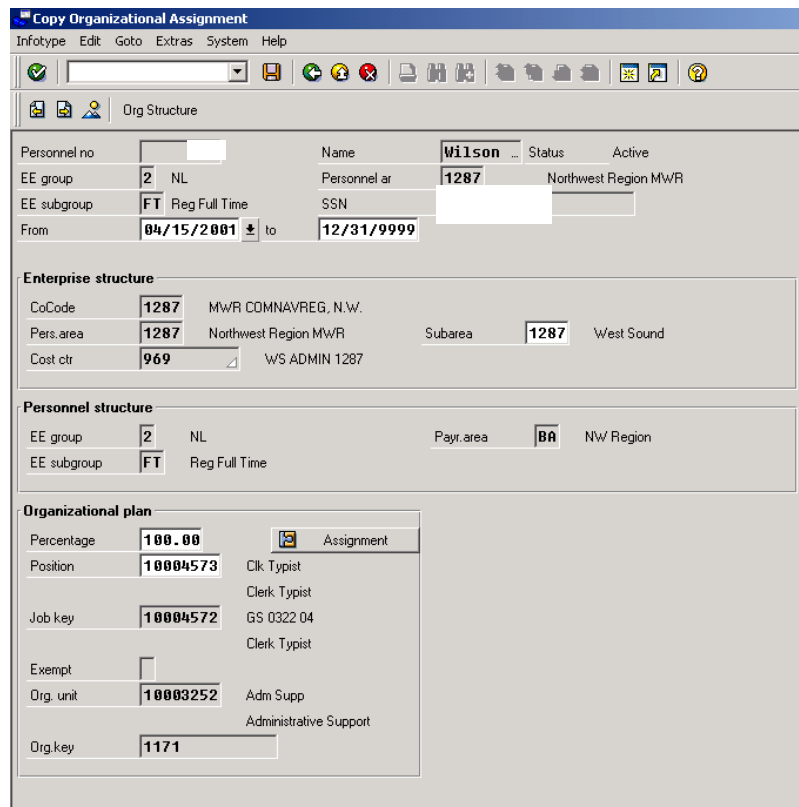


**NOTE:** After striking the Enter key or clicking the green check mark, you will receive a message stating **“W: Previous record will be delimited”**, i.e., the end date of the last action will now be populated with the “From date” of the new action. This message appears on each infotype.


Press the Enter key or click the green checkmark icon  to validate the record and then save it by clicking the Save icon. .

The system will now roll to Copy Organizational Assignment

*Infotype 0001 – Copy Organizational Assignment:*



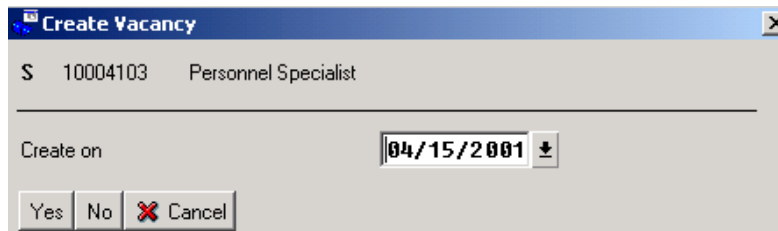
**No Entry is required for this infotype.**

Press the Enter button or the green checkmark  to validate the entries. Save the Record.

**“W: Previous record will be delimited”**, (i.e., the end date of the last action will now be populated with the From date of the new action).

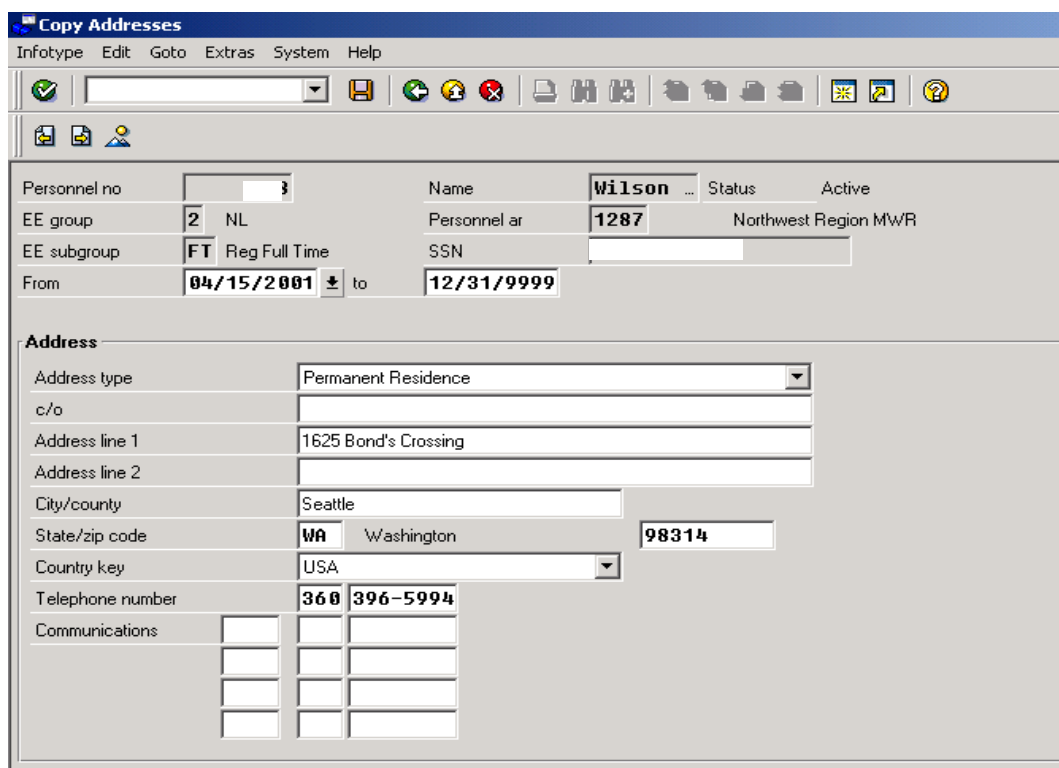
## Other Personnel Actions

During the normal flow of this process, a pop-up window will appear to create a vacancy for the employee's previous position. Click on the "Yes" button on this window. **The date must be changed to the date of the action.** Today's date will default in, so if the date of action is different from today's date, you must change it.



A small dialog box titled "Create Vacancy" with a close button (X) in the top right corner. It contains the text "S 10004103 Personnel Specialist". Below this, there is a "Create on" label followed by a date field containing "04/15/2001" and a small downward arrow icon. At the bottom, there are three buttons: "Yes", "No", and "Cancel" (with a red X icon).


### Infotype 0006- Copy Addresses




A screenshot of the "Copy Addresses" window. The title bar says "Copy Addresses". Below the title bar is a menu bar with "Infotype", "Edit", "Goto", "Extras", "System", and "Help". Below the menu bar is a toolbar with various icons. The main area contains several fields: "Personnel no" (empty), "Name" (Wilson ...), "Status" (Active), "EE group" (2 NL), "Personnel ar" (1287), "Northwest Region MWR", "EE subgroup" (FT Reg Full Time), "SSN" (empty), "From" (04/15/2001), and "to" (12/31/9999). Below these fields is a section titled "Address" with a dropdown menu for "Address type" (Permanent Residence). Below this are several text fields: "c/o", "Address line 1" (1625 Bond's Crossing), "Address line 2", "City/county" (Seattle), "State/zip code" (WA Washington 98314), "Country key" (USA), and "Telephone number" (360 396-5994). At the bottom, there is a "Communications" section with a grid of checkboxes.



**NOTE:** If the address does not change due to the position change action, you can right arrow past the screen and not create a new one. If you right arrow through this screen "copy withholding info W4/W5 will come up. If nothing has changed you can also right arrow past the screen. If the address changes, please correct address and save the record.

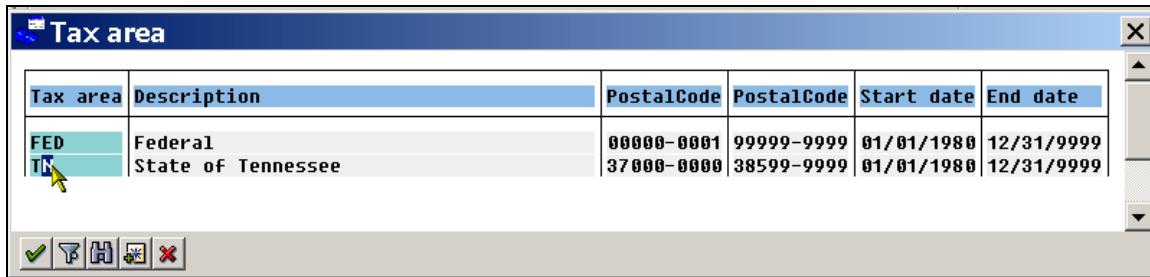
Press the Enter key or click the green checkmark icon  to validate your entries. Save this record.

The next infotype is 0210-Withholding info W4/W5 US.


Enter the correct information and press the Enter icon  and save.

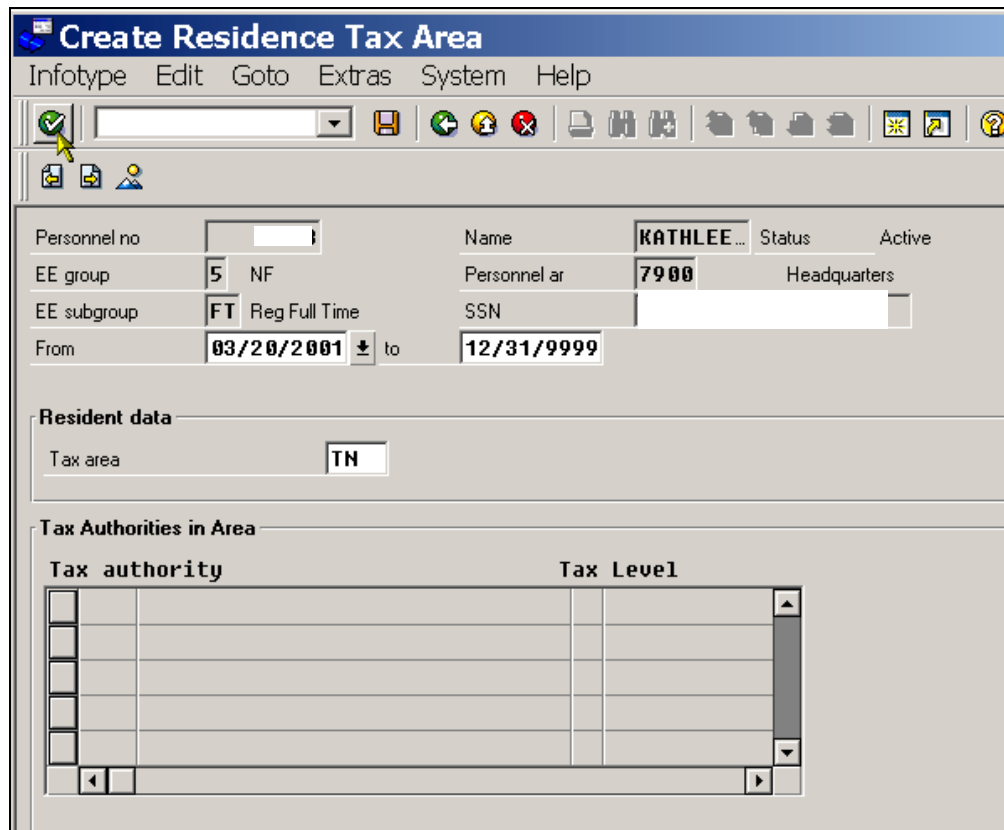
The next screen to appear is the Tax Area.

**Always select the state of residence on this pop up window.**



Tax area	Description	PostalCode	PostalCode	Start date	End date
FED	Federal	00000-0001	99999-9999	01/01/1980	12/31/9999
TN	State of Tennessee	37000-0000	38599-9999	01/01/1980	12/31/9999

Double click on state name or click once, then select the green check . This populates the tax area field on the next screen, Create Residence Tax Area.



**Create Residence Tax Area**

Infotype Edit Goto Extras System Help

Personnel no: [ ] Name: KATHLEE... Status: Active

EE group: 5 NF Personnel ar: 7900 Headquarters

EE subgroup: FT Reg Full Time SSN: [ ]

From: 03/20/2001 to: 12/31/9999



**Resident data**


Tax area: TN

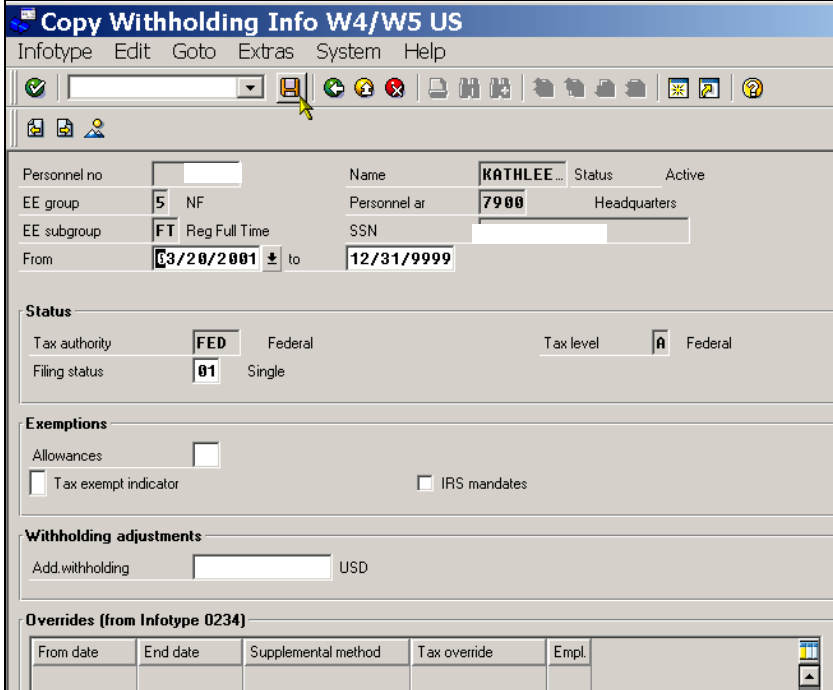
**Tax Authorities in Area**

Tax authority	Tax Level

## Other Personnel Actions



Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.


Press the Save icon .



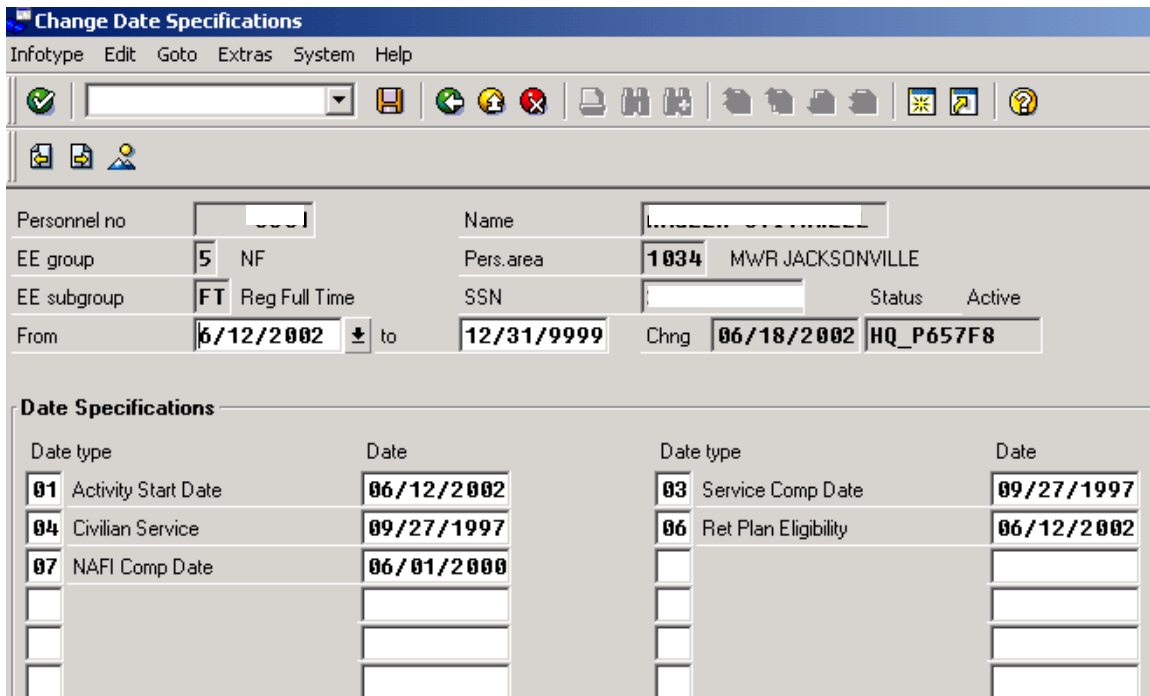
From date	End date	Supplemental method	Tax override	Empl.

If the withholding information is changing during the change of position you must make the changes on infotype 0210 – Withholding Info W4/W5 US. In this case it is for the Federal Withholding as indicated on the screen.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to Save your entries.

Press the Save icon .

The next infotype to roll will be Date Specifications.

Infotype 0041 – Date Specifications now appears:


Personnel no.	Name	EE group	Pers.area	EE subgroup	SSN	Status	From	To	Chng
		5 NF	1034 MWR JACKSONVILLE	FT Reg Full Time		Active	6/12/2002	12/31/9999	06/18/2002 HQ_P657F8

Date type	Date	Date type	Date
01 Activity Start Date	06/12/2002	03 Service Comp Date	09/27/1997
04 Civilian Service	09/27/1997	06 Ret Plan Eligibility	06/12/2002
07 NAFI Comp Date	06/01/2000		

Update any fields necessary.

**Date type 01 Activity Start Date**, which is the first date of employment at the current activity. This date populates from the new hire action. The date will need to be changed when an employee transfers to a new payroll area, i.e. Mayport to Seattle or MWR to VQ.


**Date type 04 Civilian Service Date**, which is the Comp date minus the active duty military time. In most cases, this will be the same as the Original hire date.

**Date type 03 Service Computation Date**, the date either actual or constructed by crediting service, used to determine annual leave accrual. For an employee with no creditable NAFI or military service, the service comp date is the effective date of the employee's first Federal civilian appointment. For an employee with prior creditable service, the service comp date is constructed by totaling the days, months, and years of the employee's creditable civilian and military service and subtracting that total from the effective date of the employees most recent appointment. When service credit of 4 years, 3 months, and 3 days is subtracted from the date, 1998-10-12, the result is 1994-07-09. Thus, the service comp date will then be 07-09-1994.

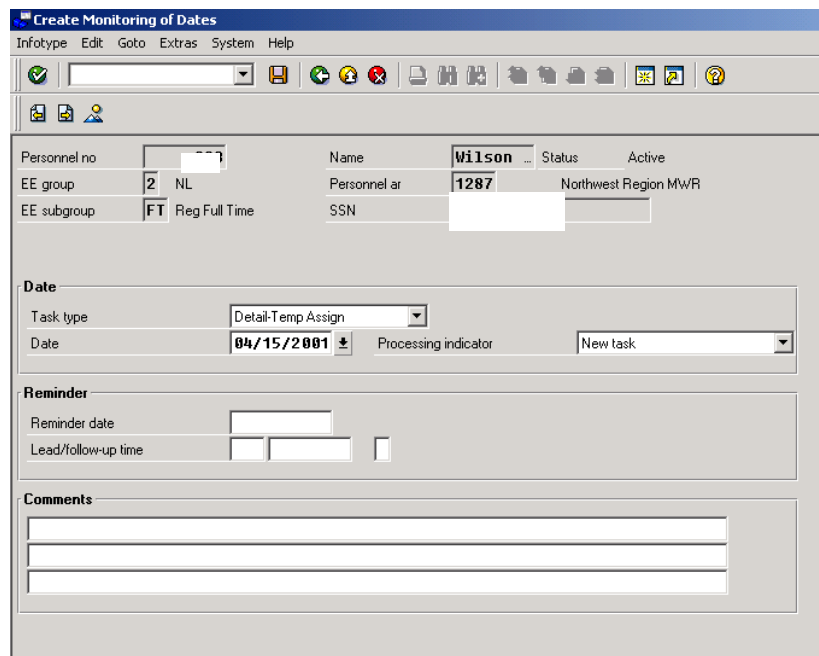
**Date type 06 Ret Plan Eligibility** is used for benefit retirement plan eligibility. This date will populate from the new hire action and will be one year from date of hire. This date will require updating when an employee changes from a Flex position to a Regular Full Time position.



**Date type 07 NAFI Computation Date**, the date either actual or constructed by crediting service, used to determine Regular NAFI employment length. For an employee with prior creditable service, The NAFI computation date is constructed by totaling the days, months, and years of the employee's creditable Regular NAFI service and subtracting that total from the employee's most recent appointment.


If there are any changes to the information shown on this infotype, make the changes, press the Enter key, or click the green checkmark icon  to validate the record and then Save it. You will now go to Create Monitoring of Dates.

### *Infotype 0019 – Create Monitoring of Dates.*



The screenshot shows the 'Create Monitoring of Dates' infotype form. The form has a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The form is divided into several sections: 'Personnel no' (blank), 'Name' (Wilson), 'Status' (Active), 'EE group' (2 NL), 'Personnel ar' (1287), 'EE subgroup' (FT Reg Full Time), 'SSN' (blank), 'Date' (04/15/2001), 'Task type' (Detail-Temp Assign), 'Processing indicator' (New task), 'Reminder' (Reminder date, Lead/follow-up time), and 'Comments' (blank text area).

The fields in this infotype are self-explanatory and can be filled in directly or by using the drop down arrows to aid in the selection. In our example, the task type has been filled by using the drop down arrow and selecting “**Detail – Temp Assign**”. We have also entered the date the action becomes effective, and entered the processing indicator “**New task**”. We could also have used the Comments section to write in any free text remarks needed.

Press the Enter key or click the green checkmark icon  to validate the record and then Save it.

After saving the previous infotype the following one will appear:

Infotype 0006 – Addresses Emergency Contact

**Copy Addresses**

Infotype Edit Goto Extras System Help

Personnel no  Name

EE group **1** NA Pers.area **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time SSN  Status Active

From **08/30/2001** to **12/31/9999**

**Address**

Address type Emergency Contact

c/o JAMES WILSON

Address line 1 166 CEDAR STREET

City/county JACKSONVILLE

State/zip code **FL** Florida **32212**


Country key USA

Telephone number **904** **125-5648**

Communications

<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

If information has not changed, just save. Press the Enter key or click the green

checkmark icon  to validate the record and then Save it.

*Infotype 0007 – Planned Working*

**Copy Planned Working Time**

Infotype Edit Goto Extras System Help

Work schedule


Personnel no  Name

EE group  NA Pers.area  Northwest Region MWR

EE subgroup  Reg Full Time SSN  Status Active


From  To

**Work schedule rule**

Work schedule rule  

**Working time**

Employment percent	<b>100.00</b>
Daily working hours	<b>8.03</b>
Weekly working hours	<b>40.13</b>
Monthly working hrs	<b>173.91</b>
Annual working hours	<b>2087.00</b>
Weekly workdays	<b>5.00</b>

Enter the new Work Schedule Rule for the employee. Press the Enter key or click the green checkmark icon  to validate the record and then Save it.

You will receive warning message to check the basic pay infotype 0008. Move through this warning message by pressing the Enter key and continue saving the new work schedule rule.

*Infotype 0008 – Create Basic Pay*

**Create Basic Pay**  
 Infotype Edit Goto Wage types Extras System Help

Salary amount Payments and deductions


Personnel no  Name  Status Active  
 EE group  NL Personnel ar  Northwest Region MWR  
 EE subgroup  Reg Full Time SSN   
 From  to

**Pay scale**

Reason  Increase in responsibility Cap.util.lvl   
 Type  Navy MWR WkHrs/period  Bi-weekly  
 Area  AC 142  
 Group  Level  Annual salary  USD

Wage	Wage type name	Dp	Amount	Currenc	Ind	Ad	Number	Unit
1010	Hourly Rate - MWR		9.75	USD		<input checked="" type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		

IU  -   USD

Enter any new basic pay information due to the position change of the employee. Press the Enter key or click the green checkmark icon  to validate the record and then Save it.

*Infotype 0009 – Copy Bank Details*

**Copy Bank Details**

Infotype Edit Goto Extras System Help

Personnel no  Name

EE group  NA Pers.area  Northwest Region MWR

EE subgroup  Reg Full Time SSN  Status Active

From  to

**Bank details**

Bank details type

Payee

Postal code/City

Bank country

Bank key  FIRST SOUTH CU

Bank account number  Bank control key

Payment method  EFT (ACH)

Payment currency

**Note: If the bank information does not change, DO NOT save this record, right arrow through.**

Infotype 9001 – Copy DOD/MWR Specific Data

**Copy DOD / MWR Specific Data**

Infotype Edit Goto Extras System Help

From **08/30/2001** to **12/31/9999**

**Locale Information**

DOD NAFI organization code	<b>NU22</b>	Navy NAFI
Duty station location	<b>121510031</b>	Jacksonville, FL
NAF personnel office identifier	<b>10034</b>	Jacksonville, FL
DOD MWR activity code	<b>48</b>	None of the above


**USA Funding Under MDA**

USA indicator	<b>N</b>	Not covered under USA MDA
---------------	----------	---------------------------

**Miscellaneous**

Welfare to work hire code	<b>D</b>	Hired on or before March 7, 1997
DOD dependent-sponsor relationship	<b>ZZ</b>	Not applicable. Not a dependent of a sponsor.
Person hispanic category code	<b>9</b>	Not applicable
Person designator type code	<b>S</b>	Social security number
Off duty military code	<b>N</b>	No; not a military member on active duty
Source of recruitment		

**You must change all applicable information due to the position change action.**

Press the Enter key or click the green checkmark icon  to validate the record and then Save it.


*Infotype 0171 – Copy General Benefits Information*

Personnel no	020	Name	Eva Wil...	Status	Active
EE group	2 NL	Personnel ar	1287	Northwest Region MWR	
EE subgroup	FT Reg Full Time	SSN			
From	04/15/2001	to	12/31/9999		

<b>General Benefits Information</b>		
Benefit area	NU	Navy (MWR)
1st Program grouping	SE	Seattle
2nd Program grouping	FULL	Full-Time

No data entry is required. Information will be populated based on the position information. **However, this record must be saved.**


Press the Enter key or click the green checkmark icon  to validate the record and then Save it.

*Infotype 0378 – Adjustment reasons*

The screenshot shows the 'Create Adjustment Reasons' window for Infotype 0378. The fields are populated as follows:

Personnel no		Name	Wilson ...	Status	Active
EE group	2 NL	Personnel ar	1287	Northwest Region MWR	
EE subgroup	FT Reg Full Time	SSN			
From	04/15/2001	to	12/31/9999		
Benefit area	Navy (MWR)				
Adjustment reason	Position Change				

The field “Adjustment Reason” will already be filled in based on the Position Change action. No entry is required. **However, the record must be saved.**

Press the Enter key or click the green checkmark icon  to validate the record and then Save it.

The Personnel Action Screen will be shown and the user receives the message “**Record Created**”.

This process is now completed.

**Note: If an employee is now eligible for benefits, follow the documentation for benefit enrollment.**





## Process a Cash Award/Lump Sum Payment

This procedure describes the steps necessary to process a lump sum cash award through the SAP Human Resources system. Verify that you have all the approving documentation before starting the process. You will need a performance evaluation with two approving signatures and the award amount. **This process will be carried out at some time other than during the annual appraisal period.** The annual appraisal process also allows the awarding of a cash award.

**Note:** Email PAR to ADP payroll person for Cash Award Lump Sum

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTION**

Transaction Code: **PA40**

Action type	Personnel no.	EE group	EE subgroup
Rehire			
Leave of Absence			
Return from Leave of Absence			
Adjustment in Pay			
Retirement			
External Hire			
External Separation			
Annual Appraisal			
<b>Cash Award / Lump Sum Payment</b>			

We have chosen Mr. Andrew Anderson to receive this lump sum cash award. We entered his personnel number directly into the field requesting the number.

Field Name	Description	R/O/C	User Action/Values
<b>Personnel Number</b>	Employee Number	R	May be entered directly or searched for using the drop down arrow.
<b>From</b>	The date of the lump sum payment	R	Enter the first date of the pay period that the amount is to be paid.
<b>Highlight the Cash Award Action</b>	This is an entry in the action type listing	R	There is a small box to the left of the text describing the action. Click on the box to highlight.

Click on the Execute button



The cash award action has been started and the applicable infotype will appear as shown below.

**Copy Actions**  
 infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.no.   
 Name **Andrew Anderson**  
 EE group **5** NF Personnel ar **1287** Northwest Region MWR  
 EE subgroup **FT** Reg Full Time SSN   
 From **01/25/2001** to **12/31/9999**

**Personnel action**  
 Action type **Cash Award / Lump Sum Payment**  
 Reason for action **?**

**Status**  
 Employment **Active**

**Organizational assignment**  
 Position **10001244** Snack Bar Technician  
 Personnel area **1287** Northwest Region MWR  
 Employee group **5** NF  
 Employee subgroup **FT** Reg Full Time

**Reason for action**

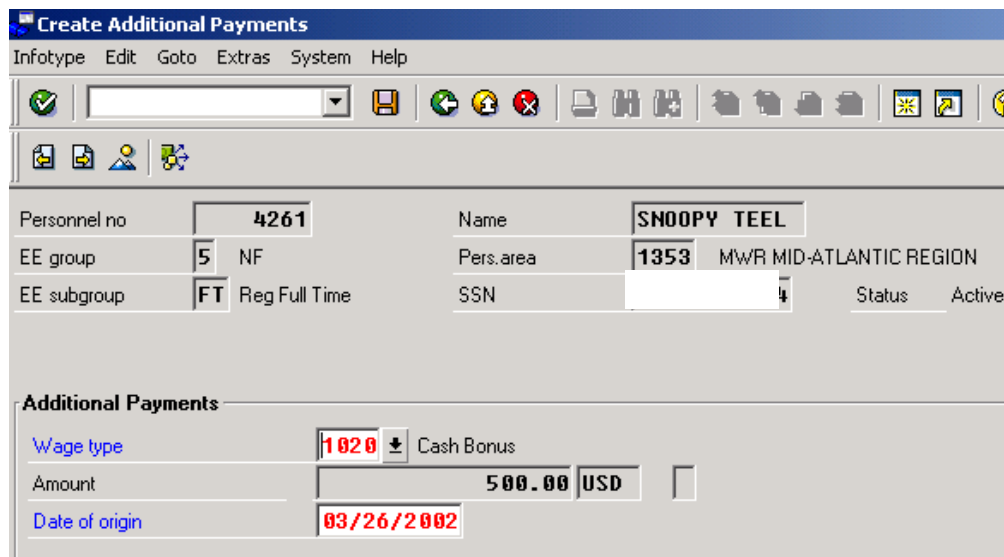
ActR	Name of reason for action
<b>01</b>	Cash Award
<b>02</b>	Annual Leave

**Additional actions**


Start date	Act	Action type	ActR	Reason f.action
01/25/2001	Z0	New Hire	01	New Hire

## Other Personnel Actions

The screen above shows only one field available for data entry. The small window shows the only acceptable entry, **01 – Cash Award**. Click on the Green check mark icon on the window and the entry will be copied on to the infotype. Save the transaction and the next screen in the transaction series will show.



Field Name	Description	R/O/C	User Action/Values
Wage Type	Used for payroll processing	R	“1020” will default. Do NOT change.
Amount	Dollar amount of the cash bonus	R	Enter the amount of the bonus
Date of Origin	The date the amount is to be paid	R	Enter the first day of the pay period that the amount is to be paid.

Save the transaction by clicking the Save icon . The result is that the infotype 0015 – Additional Payments is created and the action is complete. A PAR will be created to show that the employee received a cash award.

**Enter dollar amount of cash bonus in “Remarks” section of PAR before emailing to payroll. Review the instructions for emailing the PAR to payroll. Email PAR to ADP payroll person.**



## Process the Annual Appraisal Documentation into SAP

### USE THIS PROCESS ONLY FOR ANNUAL APPRAISALS

**BEFORE YOU BEGIN THE ANNUAL APPRAISAL VERIFY THAT THERE ARE NO OTHER ACTIONS ALREADY CREATED WITH THE SAME DATE AS THE ANNUAL APPRAISAL**  
**USE PA20-DISPLAY –TO VERIFY**

This procedure describes the steps necessary to process the annual appraisal (Evaluation) documentation through the SAP Human Resources system. This process will be carried out during the annual appraisal period. The annual appraisal process allows the awarding of a cash bonus as well as an increase in pay to certain classes of employees. However, the key part of the appraisal process is to inform the employee and to document their progression toward becoming a more valuable part of the organization.


Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

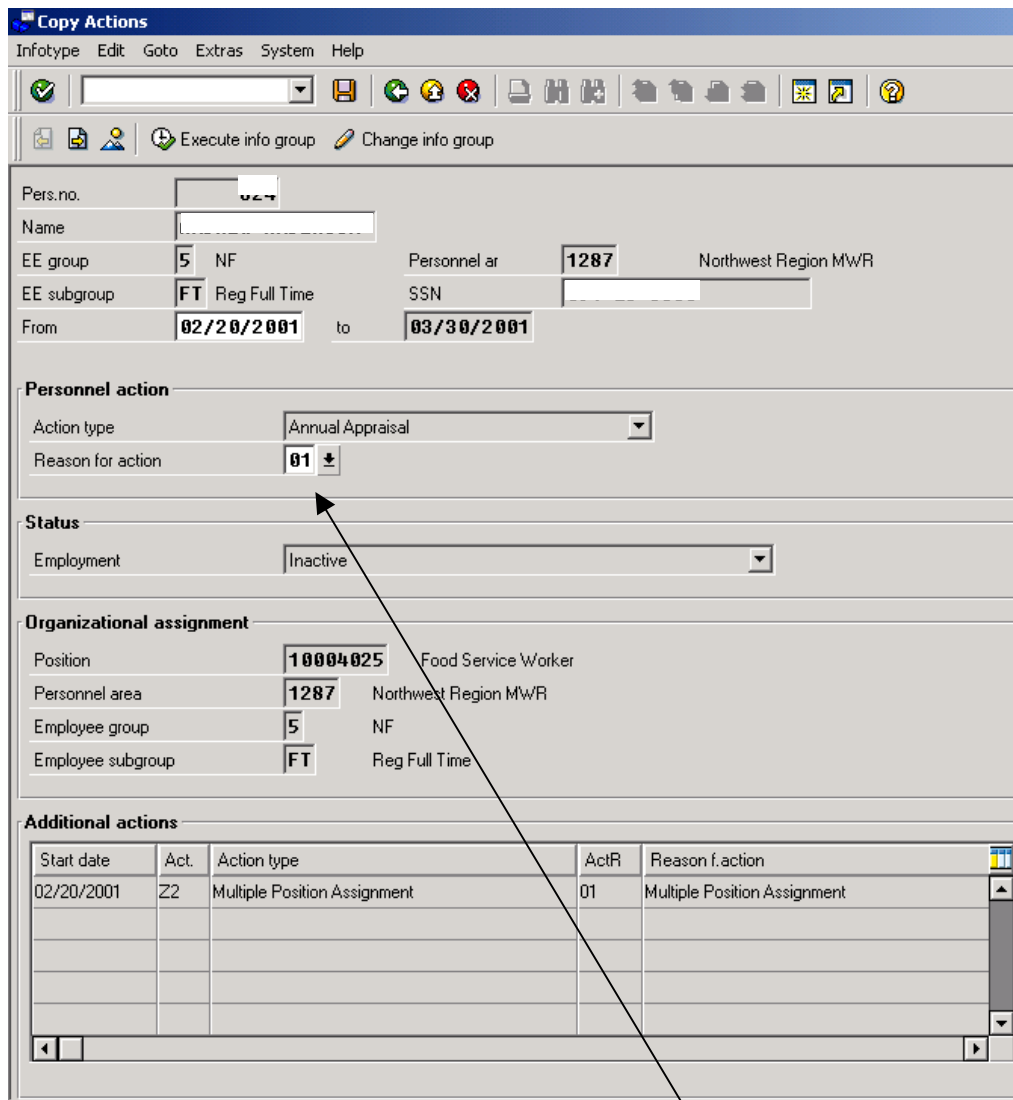
Transaction Code: **PA40**

Action type	Personnel ar	EE group	EE subgroup
Separation			
Rehire			
Leave of Absence			
Return from Leave of Absence			
Adjustment in Pay			
Retirement			
External Hire			
External Separation			
Annual Appraisal			
Cash Award / Lump Sum Payment			
Activity Transfer			

## Other Personnel Actions



We have picked the employee ready for his annual appraisal, Mr. Andrew Anderson, Personnel No. 624 by directly inputting the number. **Enter the first date of the pay period after the approving official signs and updates the appraisal** and clicked the small box to the left of the text describing the action type, Annual Appraisal.

We now click the Execute icon  to start the recording of the results of the appraisal.



Start date	Act.	Action type	ActR	Reason f. action
02/20/2001	Z2	Multiple Position Assignment	01	Multiple Position Assignment

In the Personnel Action section of the screen, we must enter the reason for the action using the drop down arrow to select “Annual Appraisal – 01”

Press the enter key  to validate the entries and then click the Save icon .

The infotype 0025 – Create Appraisals screen appears:

**Create Appraisals**  
Infotype Edit Goto Extras System Help

Personnel no. [ ] Name **KATHLEEN DECENT**  
EE group **5** NF Pers.area **7900** MWR HEADQUARTERS  
EE subgroup **FT** Reg Full Time SSN [ ] Status Active  
From **11/01/2002** to **10/31/2003**

**Appraisal**

Appraisal criterion	Weighting	Points	Total
<b>01</b> Overall Appraisal	<b>1.00</b>	<b>5</b>	<b>5.00</b>
[ ]	<b>0.00</b>	[ ]	<b>0.00</b>
[ ]	<b>0.00</b>	[ ]	<b>0.00</b>
[ ]	<b>0.00</b>	[ ]	<b>0.00</b>
[ ]	<b>0.00</b>	[ ]	<b>0.00</b>
[ ]	<b>0.00</b>	[ ]	<b>0.00</b>
[ ]	<b>0.00</b>	[ ]	<b>0.00</b>


Total points **5.00**


**Appraisal attributes**

Appraiser **John Smith** Appraisal date **11/01/2002**

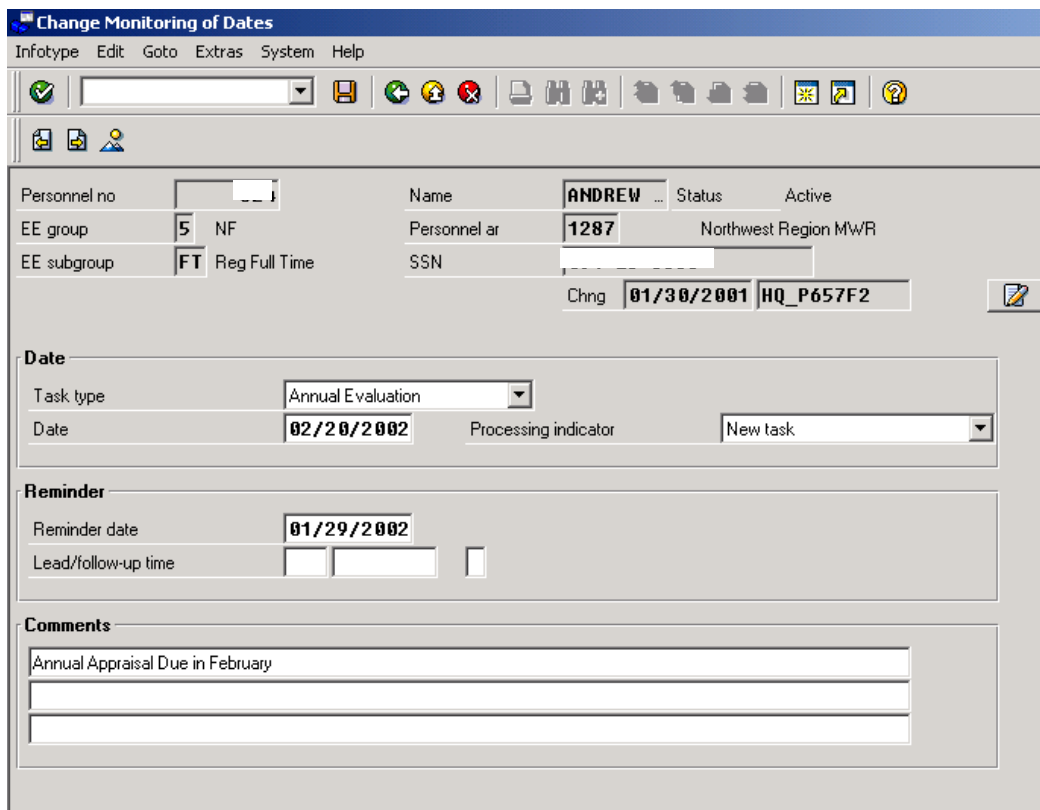
Field Name	Description	R/O/C	User Action/Values
<b>Note: Due to conversion, all begin dates cannot be prior to your conversion date. Otherwise, enter the actual from and to dates.</b>			
<b>From Date</b>	The beginning date of the appraisal.	R	This date will default to the begin date of the action. It may be changed, but cannot be prior to the conversion date.
<b>To Date</b>	The end date of the appraisal	R	Enter the end date of the appraisal, normally one year.
<b>Appraisal Criterion</b>	Value will default to 01	R	Will default to <b>01- Overall Appraisal</b>
<b>Points</b>	The score of the employee's appraisal.	R	Enter the score from the appraisal form.
<b>Total Points</b>	Will be calculated by the system	R	See below for evaluation rating points.
<b>Name of Appraiser</b>	Name of the appraiser	R	Enter the last names of the 1 <sup>st</sup> and 2 <sup>nd</sup> level appraisal officials.
<b>Appraisal Date</b>	Date the appraisal was approved	R	Enter the date the employee signed the appraisal.

5 = Outstanding, 4 = Highly Satisfactory, 3 = Satisfactory, and 0 = Less than Satisfactory.

Press the Enter button  or key to validate the entries.



Save the transaction by clicking the Save icon. . The system automatically rolls to infotype 19 – Monitoring of Dates.

### *Infotype 0019 – Create Monitoring of Dates*



The screenshot shows the 'Change Monitoring of Dates' infotype screen. The title bar reads 'Change Monitoring of Dates'. The menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The toolbar contains various icons for saving, deleting, and other actions. The main form area is divided into several sections:

- Personnel data:** Personnel no. (blank), Name (ANDREW), Status (Active), EE group (5 NF), Personnel ar (1287), EE subgroup (FT Reg Full Time), SSN (blank), Chng (01/30/2001 HQ\_P657F2).
- Date section:** Task type (Annual Evaluation), Date (02/20/2002), Processing indicator (New task).
- Reminder section:** Reminder date (01/29/2002), Lead/follow-up time (blank).
- Comments section:** A text area containing 'Annual Appraisal Due in February'.

The information for task type and dates default from other infotypes. Select  and save using .

The next infotype that must be completed is 0008 – Create Basic Pay.

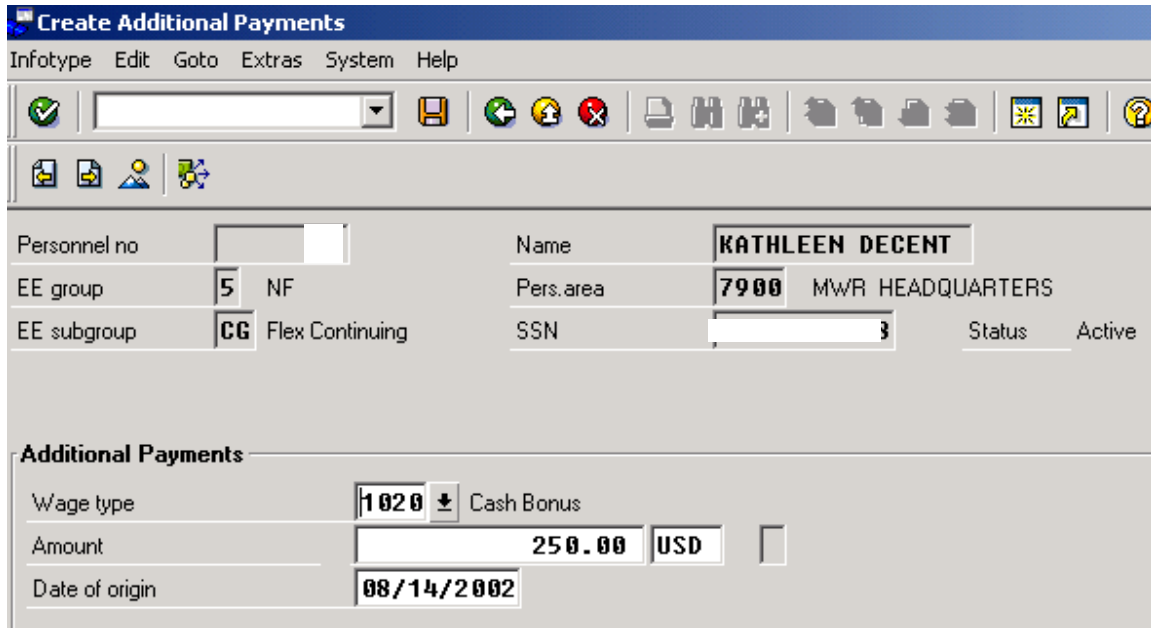
### *Screen: 0008 – Create Basic Pay*





If a bonus is not being given right arrow  to the next infotype

### Create Additional Payments



**Create Additional Payments**

Infotype Edit Goto Extras System Help

Personnel no. [ ] Name **KATHLEEN DECENT**

EE group **5** NF Pers.area **7900** MWR HEADQUARTERS

EE subgroup **CG** Flex Continuing SSN [ ] Status Active

**Additional Payments**

Wage type **1020** Cash Bonus

Amount **250.00** USD

Date of origin **08/14/2002**

Field Name	Description	R/O/C	User Action/Values
<b>Wage type</b>	Type of payment	R	Enter 1020 Cash Bonus or select using drop down arrow
<b>Amount</b>	Dollar amount	R	Enter dollar amount of payment
<b>Date of origin</b>	Date of payment	R	Defaults based on action date

This completes the actions needed for annual appraisal. If cash award is given, follow instructions for printing hard copy and emailing PAR.



## Process an Adjustment in an Employee's Pay

### **Note: Promotions are to be processed under Change in Position Action**

This procedure describes the steps necessary to process an adjustment in pay through the SAP Human Resources system. Adjustments in pay are made for the following reasons:

ActR	Name of reason for action
01	New Pay schedule change
02	Change pay rate
03	COLA increase
04	Change in responsibility
05	Correction of an error

Be sure that you have all the appropriate, approved back-up documents, i.e., for merit increases, a performance evaluation with two levels of approval; for schedule changes, an approved pay schedule and the Commanding Officer's approval to give the pay increase, etc.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

## Other Personnel Actions

**Personnel Actions**  
HR Master Data Edit Goto Extras Utilities Settings System Help

Personnel no.

Name **Royer , Rebecca Deidre**

EE group **2** NL Pers. area **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time Cost center **669** GALLERY GOLF PR.

From **02/15/2001**

Action type	Personnel ar	EE group	EE subgroup
<input type="checkbox"/> New Hire			
<input type="checkbox"/> Change in Position			
<input type="checkbox"/> Multiple Position Assignment			
<input type="checkbox"/> Separation			
<input type="checkbox"/> Rehire			
<input type="checkbox"/> Leave of Absence			
<input type="checkbox"/> Return from Leave of Absence			
<input checked="" type="checkbox"/> Adjustment in Pay			
<input type="checkbox"/> Retirement			
<input type="checkbox"/> External Hire			
<input type="checkbox"/> External Separation			




We have chosen the employee by directly entering the Personnel Number 162, Ms. Rebecca Royer, we have highlighted the action we wish to process “Adjustment in Pay” and we want this adjustment to be effective from the first day of the payroll period.

Click the Execute button



The resulting effect is to start the recording of the adjustment in Pay. The first screen, as shown below, is the Copy Actions infotype and the only entry allowed here is to enter the reason for the pay adjustment using the drop down arrow. For example, the reason is shown as 02 – Change Pay Rate.

### Copy Actions

Press the Enter button  or Enter key to validate the entries. A warning message appears, “Record will be delimited”, Select the  to acknowledge the system message. Enter and save the transaction by clicking the Save icon. 

## Other Personnel Actions



Infotype 0000 is created and infotype 0008 – Create Basic pay will be shown.


### Create Basic Pay

We have changed the Hourly rate of pay to 11.25 to reflect the Increase in pay

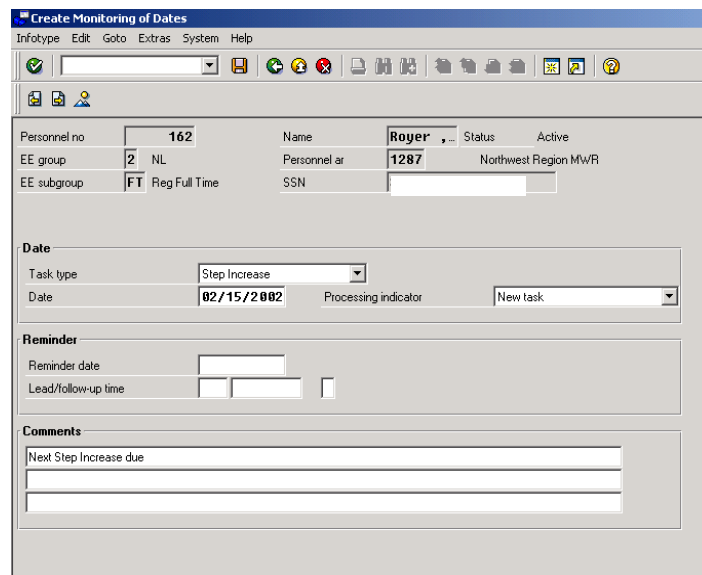
Field Name	Descriptions	R/O/C	User Action/Value
<b>Reason</b>	Reason for this change in the infotype	R	You may use the dropdown menu for your selections
<b>Type</b>	User defined	R	Will default in Navy MWR
<b>Area</b>	User defined	R	Will default in the area
<b>Group</b>	User defined	R	Enter the employee's group using the drop down menu to select. User MUST verify for accuracy.
<b>Level</b>	Level of Pay	R	Will default based on the entry in the group field. User MUST verify for accuracy.


<b>Hourly Rate Wage types: 1010 = Hourly rate</b>	Enter correct rates for each wage type listed	R	Enter the hourly rate(s) or have the rate(s) default if the annual salary field is populated. <b>Note: NA, NL, &amp; NS groups will populate hourly rate. NF and CC wage rates must be entered.</b>
<b>Annual Salary</b>	Annual Salary	R	This field will default as no entry is allowed.
<b>Capt util. Lvl</b>	Used for annual salary calculation	R	The field defaults "100" Note: This field must NOT be changed.
<b>Work/Hrs Period</b>	Work hours in a period	R	This field will default in.

Press the Enter button  or key to validate the entries. The system generates a warning message, "Record will be delimited", Click  to acknowledge the message.

Save the transaction by clicking the Save icon. 

Infotype 0008 is validated and the next screen Infotype 0019 – Monitoring of Dates is put into the action.



Enter button  or key, and save the transaction. The Adjustment in basic pay action is complete.

Follow the instructions in Chapter 3 for printing and/or emailing PAR.



## Process a Step Increase

**Note: Promotions are to be processed under Change in Position Action**

This procedure describes the steps necessary to process an adjustment in pay through the SAP Human Resources system. Adjustments in pay are made for the following reasons:

ActR	Name of reason for action
01	New Pay schedule change
02	Change pay rate
03	COLA increase
04	Change in responsibility
05	Correction of an error

Be sure that you have all the appropriate, approved back-up documents, i.e., for merit increases, a performance evaluation with two levels of approval; for schedule changes, an approved pay schedule and the Commanding Officer's approval to give the pay increase, etc.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

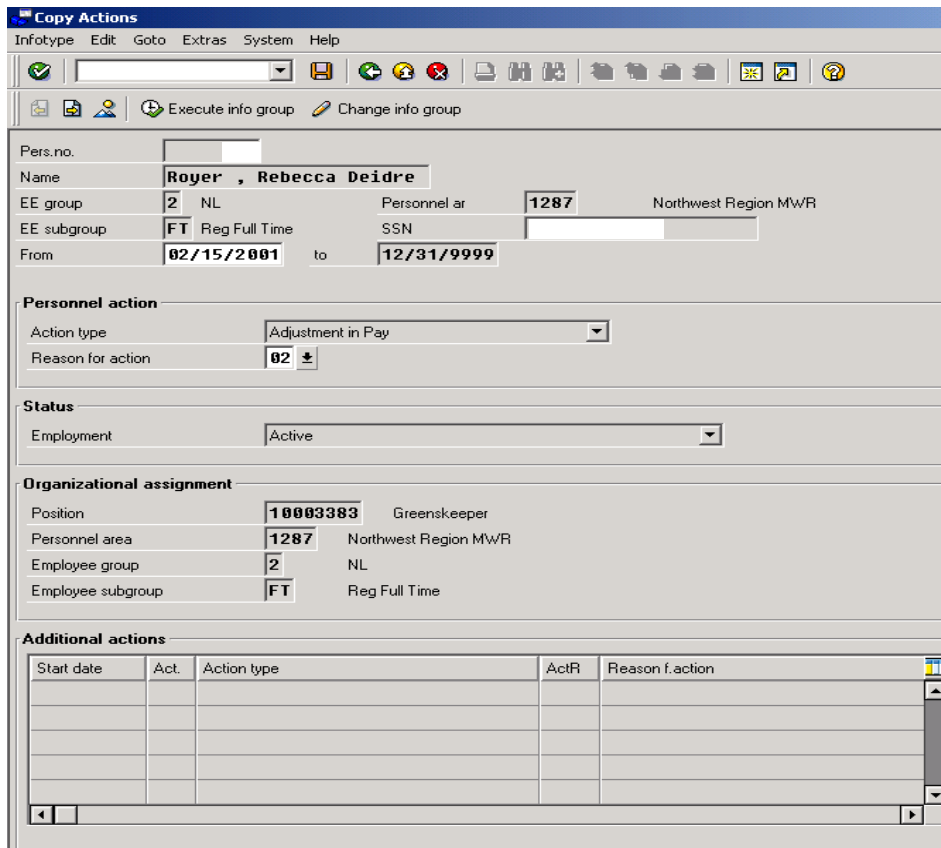
Transaction Code: **PA40**

We have chosen the employee by directly entering the Personnel Number 162, Ms. Rebecca Royer, we have highlighted the action we wish to process “Adjustment in Pay” and we want this adjustment to be effective from the first day of the payroll period.

Click the Execute button 

The system will roll to Infotype 0000 – **Copy Actions**. The only entry allowed here is to enter the reason for the pay adjustment using the drop down arrow. For example, the reason is shown as 02 – Change Pay Rate.

### Copy Actions



**Copy Actions**

Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.no.

Name **Royer , Rebecca Deidre**

EE group **2** NL Personnel ar **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time SSN

From **02/15/2001** to **12/31/9999**

**Personnel action**

Action type Adjustment in Pay

Reason for action **02**

**Status**

Employment Active

**Organizational assignment**

Position **10003383** Greenskeeper




Personnel area **1287** Northwest Region MWR

Employee group **2** NL

Employee subgroup **FT** Reg Full Time

**Additional actions**

Start date	Act.	Action type	ActR	Reason f.action

Press the Enter button  or Enter key to validate the entries. A warning message appears. Select the  to acknowledge the system message. Enter and save the transaction by clicking the Save icon. 



Infotype 0000 is created and infotype 0008 – Create Basic pay will be shown.



*Create Basic Pay*

We have changed the Hourly rate of pay to 11.25 to reflect the Increase in pay

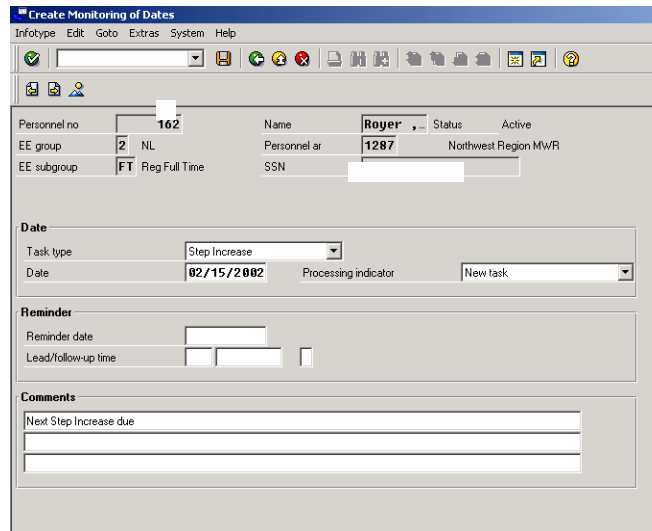
Field Name	Descriptions	R/O/C	User Action/Value
<b>Reason</b>	Reason for this change in the infotype	R	You may use the dropdown menu for your selections
<b>Type</b>	User defined	R	Will default in Navy MWR
<b>Area</b>	User defined	R	Will default in the area
<b>Group</b>	User defined	R	<b>Enter the employee's group using the drop down menu to select.</b> User MUST verify for accuracy. .
<b>Level</b>	Level of Pay	R	Will default. User MUST verify for accuracy.
<b>Hourly Rate</b> <b>Wage types:</b> <b>1010 = Hourly rate</b>	Enter correct rates for each wage type listed	R	Enter the hourly rate(s) or have the rate(s) default if the annual salary field is populated. <b>Note: NA, NL, &amp; NS groups will populate hourly rate. NF and CC wage rates must be entered.</b>
<b>Annual Salary</b>	Annual Salary	R	This field will default.
<b>Capt util. Lvl</b>	Used for annual salary calculation	R	The field defaults "100" Note: This field must NOT be changed.
<b>Work/Hrs Period</b>	Work hours in a period	R	This field will default in.


Press the Enter button  or key to validate the entries. The system generates a warning message. Click  to acknowledge the message.

Save the transaction by clicking the Save icon.



Infotype 0008 is validated and the next screen Infotype 0019 – Monitoring of Dates is put into the action.



We have entered the Task Type, which was the “**Step Increase**” type of task; “**New Task**” defaults Processing indicator and entered some comments regarding when the next step increase is due. If no entry is required, “right arrow” through this screen. Press the Enter button  or key, and save the transaction. The Adjustment in basic pay action is complete.

Follow the instructions in chapter 3 for printing and/or emailing PAR.



**NOTE: Enter the last day worked as the date of the action. The system will roll to the next date for the termination date. Enter information in remark section of PAR.**



### **Process a NAF Employee Separation**

This procedure documents the steps required to process an employee due for separation for any reason.

This action uses the copy mode for several infotypes. It is important that you remember that information that has defaulted in the fields pertains to a previous action and some fields may need to be changed to reflect the current action.

After you have entered your changes to an infotype and used the Enter key, you should receive a warning telling you that the previous record will be delimited. This verifies that you want to make the change and that you have changed the From date to reflect that your record will now be the current one. You may proceed through the message by using the Enter again and you will then be prompted to Save your record

Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

**Personnel Actions**

HR Master Data Edit Goto Extras Utilities Settings System Help

Personnel no.

Name **ANDREW ANDERSON**

EE group **5** NF Pers. area **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time Cost center **428** CONCOURSE FC O...

From **03/30/2001**

Action type	Personnel an	EE group	EE subgroup
<input type="checkbox"/> New Hire			
<input type="checkbox"/> Change in Position / Transfer			
<input type="checkbox"/> Multiple Position Assignment			
<input checked="" type="checkbox"/> Separation			
<input type="checkbox"/> Rehire			
<input type="checkbox"/> Leave of Absence			
<input type="checkbox"/> Return from Leave of Absence			
<input type="checkbox"/> Adjustment in Pay			
<input type="checkbox"/> Retirement			
<input type="checkbox"/> External Hire			
<input type="checkbox"/> External Separation			

Field Name	Description	R/O/C	User Action/Values
<b>Personnel Number</b>	The system generated Personnel ID Number	R	Enter the personnel number, if known. Use the dropdown arrow to aid in the selection.
<b>From date</b>	The date the action is effective	R	Enter the last worked date. The date for separation will roll to the next day.
<b>Action Type</b>	The type of action that is to be performed	R	Select and highlight the Separation action.

Select the Execute icon



The system will roll to Infotype 0000 – Copy Actions

## Copy Actions

**Copy Actions**

Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers. no.

Name **ANDREW ANDERSON**

EE group **5** NF Personnel ar **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time SSN

From **03/31/2001** to **12/31/9999**

**Personnel action**

Action type Separation

Reason for action **03**

**Status**

Employment Withdrawn

**Organizational assignment**

Position Food Service Worker

Personnel area **1287** Northwest Region MWR

Employee group **T** NF

Employee subgroup **TR** Reg Full Time

**Additional actions**

Start date	Act	Action type	ActR	Reason f. action


Field Name	Description	R/O/C	User Action/Values
<b>Action Type</b>	Separation	R	This field will default in
<b>Reason for Action</b>	The reason the action is being performed	R	Use the drop down arrow to aid in the selection.
<b>Employment</b>	User defined	R	This field will default in with <b>“Withdrawn”</b>
<b>Position</b>	User defined	R	Blank out position number
<b>Personnel Area</b>	The assigned area of the position within the organization	R	This field will default in  <b><u>DO NOT CHANGE</u></b>
<b>Employee Group</b>	The group of employees that the individual has been assigned to	R	This field will default in. <b>MUST be changed to “T”-separated.</b>
<b>Employee SubGroup</b>	The assigned subgroup for the employee	R	This field will default in. <b>MUST be changed to “TR”-terminated.</b>

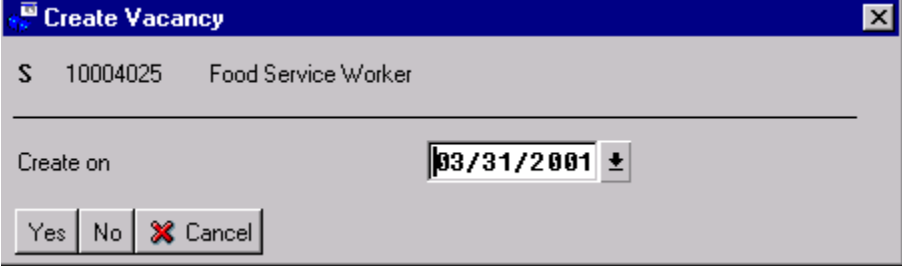
Press the Enter 


You will receive a message that the previous infotype will be delimited.

Press Enter  again.

The Create Vacancy informational window will appear. Select the “Yes” button and Save

the transaction. . If necessary, change the date on this window to the termination date.



Save the transaction by pressing the Save icon .

## Other Personnel Actions

The screen will roll to Infotype 0001 – Copy Organizational Assignment.

**Copy Organizational Assignment**

Infotype Edit Goto Extras System Help

Org Structure

Personnel no **4261** Name **SN00PY TEEL**

EE group **R** Retiree Pers.area **1353** MWR MID-ATLANTIC REGION

EE subgroup **RT** Retiree SSN **105/02/2002** Status Withdrawn

From **12/31/9999** to **12/31/9999**

**Enterprise structure**

CoCode **1353** MWR MID-ATLANTIC REGION

Pers.area **1353** MWR MID-ATLANTIC REGION Subarea **1042** NORFOLK

Cost ctr **1567** NS CEP-58 GYM PRG

**Personnel structure**

EE group **T** Separated Payr.area **MA** Mid-Atlantic Region

EE subgroup **TR** Terminated

**Organizational plan**

Position **99999999** Integration: default posi



Job key **10001254** Recreation Aide (Gym)

Exempt **N**

Org. unit **10006070** Athletics

Org.key **1042**

Field Name	Description	R/O/C	User Action and Values
<b>Co Code</b>	Company Code	R	This field will default in.
<b>Pers Area</b>	Personnel Area	R	This field will default in.
<b>Cost Ctr</b>	Cost Center	R	This field will default in.
<b>Subarea</b>	Personnel Subarea	R	This field will default in.
<b>EE Group</b>	Employee Group	R	This field will default in.
<b>EE Subgroup</b>	Employee Subgroup	R	This field will default in.
<b>Payr Area</b>	Payroll Area	R	This field will default in.
<b>Position</b>	Position number	R	This field will default in.

All of the fields will default in. Validate the entries and Press the Enter key . You will receive the warning “**this entry will delete a record**”. Press the Enter key .

Save the transaction by pressing the Save icon .

The system will now show Infotype 0008 – Display Basic Pay as shown below:

**Display Basic Pay**

Infotype Edit Goto Wage types Extras System Help

Salary amount Payments and deductions

Personnel no: [ ] Name: **ANDREW** Status: Inactive  
 EE group: **5** NF Personnel ar: **1287** Northwest Region MWR  
 EE subgroup: **FT** Reg Full Time SSN: [ ]  
 From: **02/20/2001** to: **12/31/9999** Chng: **02/02/2001** HQ\_P657F2

**Pay scale**

Reason: **14** Mid-yr merit/perform. increase Cap.util.lvl: **100.00**  
 Type: **01** Navy MWR WkHrs/period: **80.26** Bi-weekly  
 Area: **04** AC 142  
 Group: **NF 03** Level: **00** Annual salary: **41,214.00** USD

Wage	Wage type name	Op	Amount	Currenc	Inc	Ad	Number	Unit
<b>1010</b>	Hourly Rate - MWR		<b>19.75</b>	USD		<input checked="" type="checkbox"/>	<b>0.00</b>	

IU **02/20/2001** **12/31/9999** **19.75** USD



Right arrow, using the next record icon, through the Display Basic Pay screen.

The system will now display infotype 0006 – Create Addresses subtype 6 – Forwarding Address.





## Other Personnel Actions

Infotype 0006 – Create Addresses subtype 6 – Forwarding Address. This screen must be completed for a separated employee. **Do not change the permanent address – only the forwarding address needs to be created. If you change the permanent address the employees' taxes will be effected.**

**Create Addresses**  
Infotype Edit Goto Extras System Help

Personnel no 624 Name ANDREW Status Active  
EE group 5 NF Personnel ar 1287 Northwest Region MWR  
EE subgroup FT Reg Full Time SSN  
From 02/28/2001 to 12/31/9999

**Address**  
Address type Forwarding Address  
c/o  
Address line 1 12345 SMITH LANE  
Address line 2  
City/country SEATTLE  
State/zip code WA 93815  
Country key USA  
Telephone number 360 555-1212  
Communications


Press the Enter key . Read the Record delimited warning message. Press the Enter key again . Validate the entries.

The system will now show infotype 0171 – General Benefits Information. There are no entries required for this infotype record but the dates must be verified and the infotype saved.

**Copy General Benefits Information**  
Infotype Edit Goto Extras System Help

Personnel no 817 Name MAE CA Status Withdrawn  
EE group 4 CC Personnel ar 1287 Northwest Region MWR  
EE subgroup CG Flex Continuing SSN  
From 03/01/2001 to 12/31/9999

**General Benefits Information**  
Benefit area NU Navy (MWR)  
1st Program grouping SE Seattle  
2nd Program grouping NBEN No Benefits

Save the transaction. . Record will be created. The system will return to the Personnel Actions Screen.



## Separation/Option B Retirement

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction code: **PA40**

**Personnel Actions**

HR Master Data Edit Goto Extras Utilities Settings System Help

Personnel no.

From

	Action type	Personnel an	EE group	EE subgroup
<input type="checkbox"/>	New Hire			
<input type="checkbox"/>	Change in Position			
<input type="checkbox"/>	Multiple Position Assignment			
<input type="checkbox"/>	Separation			
<input type="checkbox"/>	Rehire			
<input type="checkbox"/>	Leave of Absence			
<input type="checkbox"/>	Return from Leave of Absence			
<input type="checkbox"/>	Adjustment in Pay			
<input type="checkbox"/>	Retirement			
<input type="checkbox"/>	External Hire			
<input type="checkbox"/>	External Separation			
<input type="checkbox"/>	Annual Appraisal			
<input type="checkbox"/>	Cash Award / Lump Sum Payment			
<input checked="" type="checkbox"/>	Option B Resignation			
<input type="checkbox"/>	Vested NAF to GS			
<input type="checkbox"/>	External Rehire			
<input type="checkbox"/>	External Change in Position			

Field Name	Description	R/O/C	User Action/Values
<b>Personnel Number</b>	EE number	R	Enter the number if known, or search using the drop down arrow
<b>From</b>	Date of action	R	Enter the last date of work. The day <b>after</b> this date will appear on the next infotype screen.
<b>Select action type</b>	Type of action that is to be performed	R	Select the Option B Resignation tab.

*Infotype 0000: Copy Actions*

**Copy Actions**

Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.no. **7622**

Name **STEPHANIE JONES**

EE group **1** NA Personnel ar **1287** MWR NORTHWEST REGION

EE subgroup **FT** Reg Full Time SSN

From **08/16/2002** to **12/31/9999**

**Personnel action**

Action type **Option B Resignation**

Reason for action **01** Voluntary Resignation

**Status**

Employment **Inactive**

**Organizational assignment**

Position **99999999** Military Assigned - Maypo



Personnel area **1019** MWR MAYPORT


Employee group **T** Separated

Employee subgroup **TR** Terminated

**Additional actions**












Field Name	Description	R/O/C	User Action and Values
Action Type	Separation	R	No entry required
Reason for Action	The reason for the action	R	You can use the drop down and select the reason
Employment	System default	R	This field will default in <b>Withdrawn</b> status
Position	User defined	R	Change to "99999999"
Personnel Area	The assigned area of the position within the organization	R	This field will default in
Employee Group	The assigned group of employees the employee will be assigned to	R	This field will default in. <b>You MUST change the EE Group to "T"- Separated.</b>
Employee Subgroup	The assigned subgroup for the employee	R	This field will default in. <b>You MUST change the EE Subgroup to "TR" – Terminated.</b>


Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to save your entries.

Press the Save icon . You will now see the next infotype in the separation action series the Infotype 0001 – Copy Organizational Assignment.

**Copy Organizational Assignment**

Infotype Edit Goto Extras System Help

 Org Structure

Personnel no **724** Name **EMMA HA...** Status **Inactive**

EE group **1** NA Personnel ar **1287** Northwest Region MWR

EE subgroup **CG** Flex Continuing SSN

From **04/03/2001** to **12/31/9999**

**Enterprise structure**

CoCode **1287** MWR COMNAVREG, N.W.

Pers.area **1287** Northwest Region MWR Subarea **1174** East Sound


Cost ctr

**Personnel structure**

EE group **T** Separated Payr.area **BA** NW Region

EE subgroup **TR** Terminated

**Organizational plan**

Percentage **100.00**  Assignment



Position **99999999** Integration: default posi


Job key **0**

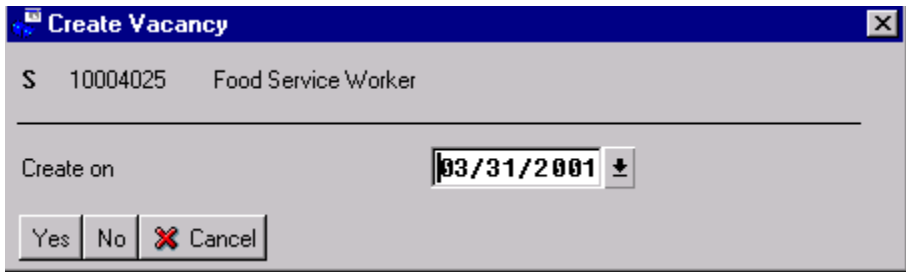
Field Name	Description	R/O/C	User Action and Values
<b>Co Code</b>	Company Code	R	This field will default in.
<b>Pers Area</b>	Personnel Area	R	This field will default in.
<b>Cost Ctr</b>	Cost Center	R	This field will default blank
<b>Subarea</b>	Personnel Subarea	R	This field will default in.
<b>EE Group</b>	Employee Group	R	This field will default in.
<b>EE Subgroup</b>	Employee Subgroup	R	This field will default in.
<b>Payr Area</b>	Payroll Area	R	This field will default in.
<b>Percentage</b>	Percentage assigned	R	Must blank out
<b>Position</b>	Position number	R	This field will default in

## Other Personnel Actions

			999999.
<b>Job Key</b>	Job key	R	This field will default in.
<b>Exempt</b>	Exempt status	R	This field will default in.
<b>Org Unit</b>	Organization unit assigned	R	This field will default in.
<b>Org Key</b>	Organization key assigned	R	This field will default in.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be warned to save your entries.

Press the Save icon . The “Create Vacancy” box will appear. Select the “yes” option. **The system defaults to today’s date. You must change it to the date of termination.**



The image shows a Windows-style dialog box titled "Create Vacancy". At the top, it displays "S 10004025 Food Service Worker". Below this, there is a "Create on" label followed by a date field containing "03/31/2001" and a small downward arrow icon. At the bottom of the dialog, there are three buttons: "Yes", "No", and "Cancel" (which has a red X icon next to it).

You will now see the next infotype in the retirement action series the Infotype 0001 – Retirement Plan Data at Termination.

### Infotype 9001 - Create Retirement Plan Data at Termination

**Create Retirement Plan Data at Termination**

Infotype Edit Goto Extras System Help

[Icons]

Personnel no	7622	Name	STEPHANIE JONES
EE group	1 NA	Pers.area	1287 MWR NORTHWEST REGION
EE subgroup	FT Reg Full Time	SSN	Status Active
From	08/16/2002 ± to	12/31/9999	

**BUPERS or other NAFI Retirement Plans**

Previous Participation in Plan Y

If Yes, Retirement Plan Option B Option B - Paid up annuity

If Discontinue, Date [ ]

Field Name	Description	R/O/C	User Action and Values
<b>From</b>	Date of Termination	R	The system enters the date of the termination. Leave the end date as 12-31-9999
<b>Previous Participation in Plan</b>	Y for previous plans N for no previous plans	R	Select Y if previous plan exists or use the drop down arrow
<b>If Yes, Retirement Plan Option</b>		R	Use drop down to select option
<b>If Discontinue Date</b>		R	Must be blank for this termination

Press the Enter icon  and Save.

You will now see the next infotype in the retirement action series the Infotype 0006 – Create Addresses, Subtype Forwarding Address.

### Infotype 0006: Create Addresses

**Create Addresses**

Infotype Edit Goto Extras System Help

Foreign address


Personnel no: 723 Name: CURTIS Status: Active  
 EE group: 1 NA Personnel ar: 1287 Northwest Region MWR  
 EE subgroup: CG Flex Continuing SSN:   
 From: 04/03/2001 to: 12/31/9999

**Address**

Address type: Forwarding Address  
 c/o:   
 Address line 1: 123 Newstreet  
 Address line 2:   
 City/county: RetirementCity  
 State/zip code: FL 32212  
 Country key: USA  
 Telephone number:   
 Communications:

Field Name	Description	R/O/C	User Action and Values
<b>Address Type</b>	Type of address	R	This field will default <b>Forwarding Address</b>
<b>C/O</b>	In care of	O	This field may default in if a record already exists. If no data defaults, you may enter the c/o person's name.
<b>Address</b>	Street name and number	R	This field may default in if a record already exists. If no data defaults, you may enter the street address.
<b>City</b>	City	R	This field may default in if a record already exists. If no data defaults, you may enter the city.
<b>State/Zip Code</b>	State/zip code	R	This field may default in if a record already exists. If no data defaults, you may enter the state.

<b>Country Key</b>	Country	R	This field will default US. You may change if needed.
<b>Telephone Number</b>	Telephone	O	This field may default in if a record already exists. If no data defaults, you may enter the telephone number.
<b>Communications</b>	User defined	O	This field may default in if a record already exists. If no data defaults, you may enter additional contact numbers.

Select the Enter icon . You will be warned to save your entries.















Press the Save icon .




You will now see the infotype 0171 – Copy General Benefits Information.

*Infotype 0171 – Copy General Benefits Information*

**Copy General Benefits Information**

Infotype Edit Goto Extras System Help

Personnel no **7622** Name **STEPHANIE JONES**

EE group **T** Separated Pers.area **1019** MWR MAYPORT

EE subgroup **TR** Terminated SSN  Status Inactive


From **08/16/2002** to **12/31/9999**


**General Benefits Information**

Benefit area **NU** Navy (MWR)

1st Program grouping **JA** Jacksonville

2nd Program grouping **NBEN** No Benefits

Press the Save icon . You will get the Record Delimited warning message.

Select the Enter icon . You will get the message “record created.”





## Process a Leave of Absence (LWOP)

This process is only used when an employee is out of work without pay. This is a non-pay status and therefore when the employee is in this status, there is no accumulation of either sick or annual leave. This status is usually set due to the employee's request. See the policy manuals for further explanation of this process.

This action uses the copy mode for several infotypes. It is important that the user remembers that information that has defaulted in the fields pertains to a previous action and some fields may need to be changed to reflect the current action.

After you have entered your changes to an infotype and used the enter key, you should receive a warning message telling you that a previous entry has been delimited. This warning verifies that you actually want to make the change and that you have changed the "From date" to reflect that your record will now be the current one. You may proceed through the message by using the Enter key again and you will then be reminded to save your changes.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

Action type	Personnel area	EE group	EE subgroup
<input type="checkbox"/> New Hire			
<input type="checkbox"/> Change in Position			
<input type="checkbox"/> Multiple Position Assignment			
<input type="checkbox"/> Separation			
<input type="checkbox"/> Rehire			
<input checked="" type="checkbox"/> Leave of Absence			
<input type="checkbox"/> Return from Leave of Absence			
<input type="checkbox"/> Adjustment in Pay			
<input type="checkbox"/> Retirement			
<input type="checkbox"/> External Hire			
<input type="checkbox"/> External Separation			
<input type="checkbox"/> Annual Appraisal			
<input type="checkbox"/> Cash Award / Lump Sum Payment			
<input type="checkbox"/> Option B Resignation			
<input type="checkbox"/> Vested NAF to GS			
<input type="checkbox"/> External Rehire			

Field Name	Description	R/O/C	User Action/Value
From date	The date the Leave of absence is to start	R	Enter the effective date of the action
Personnel Number	Employee Number	R	Enter the number or use the dropdown menu to select the correct employee
Action type	The type of action to be performed	R	Select the Leave of Absence action

Select the Execute icon



Save the transaction by clicking the icon



The result is that infotype 0000 – Copy Actions will appear.

**Copy Actions**

Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.no. 624  
 Name ANDREW ANDERSON  
 EE group 5 NF Personnel ar 1287 Northwest Region MWR  
 EE subgroup FT Reg Full Time SSN  
 From 02/15/2001 to 12/31/9999

**Personnel action**

Action type Leave of Absence  
 Reason for action 05

**Status**

Employment Inactive

**Organizational assignment**

Position 10004025 Food Service Worker  
 Personnel area 1287 Northwest Region MWR  
 Employee group 5 NF  
 Employee subgroup FT Reg Full Time

**Additional actions**

Start date	Act.	Action type	ActR	Reason f. action
02/15/2001	Z4	Adjustment in Pay	14	Mid-yr merit/perform. increase
02/15/2001	Z3	Change in Position / Transfer	01	Promotion

## Other Personnel Actions

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Field Name	Description	R/O/C	User Action/Values	Comments
<b>Action Type</b>	Leave of Absence	R	This will default in	
<b>Reason for action</b>	The reason for the action being performed	R	You can use the dropdown menu to select the reason	<b>This is the Only Field requiring an entry</b>
<b>Employment</b>	Changed to inactive	R	This will default in	
<b>Position</b>	MWR Position	R	Will default the position number	
<b>Personnel Area</b>	The assigned area within the organization	R	The field populated from the previous record	
<b>Employee Group</b>	The assigned group the employee has been assigned to	R	The field populated from the previous record	
<b>Employee Subgroup</b>	The assigned subgroup for the employee	R	The field is populated from the previous record.	

Select the Enter icon .

Save the transaction by clicking the icon



The result is that infotype 0019 – Create Monitoring of Tasks will appear

Infotype Edit Goto Extras System Help

Personnel no **7622** Name **STEPHANIE JONES**

EE group **1** NA Pers.area **1287** MWR NORTHWEST REGION

EE subgroup **FT** Reg Full Time SSN : Status Inactive

Chng **08/15/2002** **HQ\_P657F8**

**Date**

Task type **Leave of Absence**

Date of task **08/25/2002** Processing indicator **New task**

**Reminder**

Reminder date **08/25/2002**

Lead/follow-up time

**Comments**

**Leave of absence for personal reasons**

Field Name	Description	R/O/C	User Action/Values
<b>Task Type</b>	Type of task to be monitored	R	Defaults to Leave of Absence. Nothing required
<b>Date</b>	Date that the task will require action	R	Field is required if the task type was populated. <b>Enter the ted return date.</b>
<b>Processing indicator</b>	Status of task	R	Defaults as “New Task” No entry required.
<b>Comments</b>	Comments	O	Free text if comments need to be entered.

Select the Enter icon .

Save the transaction by clicking the icon



## Other Personnel Actions

Screen will now roll to Copy Kronos Information. Change the effective date and change information as needed by following the instructions below and save. If changes do not need to be made right arrow through without saving.

Field Name	Description	R/O/C	User Actions/Values
<b>Kronos badge Number</b>	Kronos badge number	C	Blank out.
<b>Kronos Terminal Group</b>	Kronos Terminal number	C	Blank out.
<b>Kronos Labor Level 3</b>	Labor Level	C	Leave as defaulted.
<b>Person Type</b>	Person Type	C	Leave as defaulted.
<b>Kronos Logon</b>	Kronos Logon	C	Leave as defaulted.
<b>Access Profile</b>	Access Profile	C	Leave as defaulted.
<b>Labor Level Set</b>	Kronos Labor Level Set	C	Leave as defaulted.

Put a checkmark in the “No Badge Necessary” box.

**Note: Employee must have either a Kronos badge number or have the No Kronos box checked.**

Press the Enter button and Save  the transaction.

Screen will roll back to the Personnel Action Screen and the Record will be created.



## Process a Return from Leave of Absence

This procedure should be used to process a return from a Leave without Pay (A Leave of Absence).

- This process uses the copy mode for several infotypes. It is important that you remember the information that has defaulted in the fields pertains to a previous action and some fields may need to be changed to reflect the current action.
- After you have entered your changes to an infotype and used the enter key, you should receive a message telling you that a previous entry will be delimited. This verifies that you want to make the change and that you have changed the From Date to reflect that your changed record will now be the current one. You will proceed through the message by using the Enter key and you will then be prompted to save your changes.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

Action type	Personnel area	EE group	EE subgroup
<input type="checkbox"/> New Hire			
<input type="checkbox"/> Change in Position			
<input type="checkbox"/> Multiple Position Assignment			
<input type="checkbox"/> Separation			
<input type="checkbox"/> Rehire			
<input type="checkbox"/> Leave of Absence			
<input checked="" type="checkbox"/> Return from Leave of Absence			
<input type="checkbox"/> Adjustment in Pay			
<input type="checkbox"/> Retirement			
<input type="checkbox"/> External Hire			
<input type="checkbox"/> External Separation			
<input type="checkbox"/> Annual Appraisal			

We have selected Personnel Number 744 and highlighted the **Return from Leave of Absence** action type.

Select the Execute icon



## Other Personnel Actions

The next infotype will be Copy Actions

**Copy Actions**

Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.no. **7622**

Name **STEPHANIE JONES**

EE group **1** NA Personnel ar **1287** MWR NORTHWEST REGION

EE subgroup **FT** Reg Full Time SSN

From **08/25/2002** to **12/31/9999**

**Personnel action**

Action type Return from Leave of Absence

Reason for action **20**

**Status**

Employment Active

**Organizational assignment**


Position **10005478** FSW Dishwasher


Personnel area **1287** MWR NORTHWEST REGION

Employee group **1** NA

Employee subgroup **FT** Reg Full Time

Field Name	Description	R/O/C	User Action/Values
<b>Action type</b>	Return from Leave of Absence	R	Will default in
<b>Reason for Action</b>	The reason the action is being performed	R	Use the drop down arrow to select the reason. <b>This is the only field that requires an entry.</b>
<b>Employment</b>	User defined	R	Will default in
<b>Position</b>	User defined	R	Will default in
<b>Personnel Area</b>	User defined	R	Will default in
<b>Employee Group</b>	The group that the employee is assigned to.	R	Will default in
<b>Employee subgroup</b>	The assigned subgroup for the employee	R	Will default in










Press the Enter button . A message “W: Record valid date to date will be delimited”.

Press the Enter button again and save .

The next infotype appears Infotype 0041 – Copy Date Specifications

**Copy Date Specifications**

Infotype Edit Goto Extras System Help

Personnel no **4261** Name **SNOOPY TEEL**

EE group **5** NF Pers.area **1353** MWR MID-ATLANTIC REGION


EE subgroup **FT** Reg Full Time SSN **1** Status Active


From **05/01/2002** to **12/31/9999**


**Date Specifications**

Date type	Date	Date type	Date
<b>01</b> Original Hire Date	<b>04/05/2002</b>	<b>02</b> Date of Rehire	<b>05/01/2002</b>
<b>03</b> Service Comp Date	<b>04/05/2002</b>	<b>04</b> Civilian Service	<b>04/05/2002</b>
<input type="checkbox"/> Ret Plan Eligibility	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>



**NOTE:** This screen is only necessary if the Leave of Absence should change the Service computation date. If not move through the record screens using the next and previous record icons as shown. .

If any changes were made, Press the Enter button .

Save the transaction using the Save icon .



## Other Personnel Actions

The screen rolls to infotype 0019 – Change Monitoring of Tasks

**Change Monitoring of Tasks**

Infotype Edit Goto Extras System Help

Personnel no **7622** Name **STEPHANIE JONES**

EE group **1** NA Pers.area **1287** MWR NORTHWEST REGION

EE subgroup **FT** Reg Full Time SSN **:** Status Inactive

Chng **08/15/2002** **HQ\_P657F8**

**Date**

Task type **Leave of Absence**

Date of task **08/25/2002** Processing indicator **Task completed**

**Reminder**

Reminder date **08/25/2002**

Lead/follow-up time

**Comments**

Field Name	Description	R/O/C	User Action/Values
<b>Task Type</b>	Type of task to be monitored	R	Defaults as Leave of Absence.
<b>Date</b>	Date that the task will required action	R	Defaults as the date entered in the Leave action (the expected date of return) <b>No entry required.</b>
<b>Processing indicator</b>	Status of task	R	From drop down arrow, select <b>Task completed.</b>
<b>Comments</b>	Comments	O	Free text for any comments.

Screen will now roll to Copy Kronos Information. Change the effective date and change information as needed by following the instructions below and save.

**Copy Kronos Information**

Infotype Edit Goto Extras System Help

Personnel no **9933** Name **MATTHEW SANDERSON**

EE group **5** NF Pers.area **7900** MWR HEADQUARTERS

EE subgroup **FT** Reg Full Time SSN  Status **Active**

Start **03/15/2003** to **12/31/9999**

**Kronos Information**

Kronos Badge Number **125465542** ☐ No Badge Necessary

Terminal Group **BEQCUST@KINGS**

Local Labor Level **8042000007**

Person Type **1** TK Employee

Kronos logon **NOR\_MSANDERS**

Access Profile **MANAGER 2**

Labor Level Set **GLK LAKE FRONT OPERATIONS**

Field Name	Description	R/O/C	User Actions/Values
<b>Kronos badge Number</b>	Kronos badge number	C	Enter the Kronos badge number.
<b>Kronos Terminal Group</b>	Kronos Terminal number	C	Enter the Terminal Group from the dropdown menu.
<b>Kronos Labor Level 3</b>	Labor Level	C	Actual work site name used for VQ only. Select from the dropdown.
<b>Person Type</b>	Person Type	C	Enter the Person Type from the dropdown menu.
<b>Kronos Logon</b>	Kronos Logon	C	Leave as defaulted.
<b>Access Profile</b>	Access Profile	C	Enter the employee's profile from the dropdown.
<b>Labor Level Set</b>	Kronos Labor Level Set	C	Only used for managers to tell Kronos which group of employees the manager will administer. Select form the dropdown.

## Other Personnel Actions

---

**Note: Employee must have either a Kronos badge number or have the No Kronos box checked.**

Press the Enter button and Save  the transaction.

Screen will roll back to the Personnel Action Screen and the Record will be created.



## Process an Activity Transfer

**NOTE: The person who is to process the Activity transfer must contact Headquarters' SAP HR Team to be able to log into the application using Transaction code PA40. Please contact Headquarters' SAP HR Team.**

**When an employee transfers from one activity to another, the process requires a Change in Position Action. The acquiring location must initiate this action. The Change in Position action must be effective the first day of the pay period.**

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction code: **PA40**

This procedure describes the steps necessary to process an activity transfer through the SAP Human Resources system. We have highlighted the Change in Position/Transfer line in the Action type section on the Personnel Actions screen and we now click the Execute

icon.



**Personnel Actions**

HR Master Data Edit Goto Extras Utilities Settings System Help

Personnel no. **328** Name **Wilson , Eva Anne**

EE group **2** NL Pers.area **1287** Northwest Region MWR

EE subgroup **FT** Reg Full Time Cost center **309** GENRLFUND PERS

From **04/15/2001**

Action type	Personnel ar	EE group	EE subgroup
<input type="checkbox"/> New Hire			
<input checked="" type="checkbox"/> Change in Position			
<input type="checkbox"/> Multiple Position Assignment			
<input type="checkbox"/> Separation			
<input type="checkbox"/> Rehire			
<input type="checkbox"/> Leave of Absence			
<input type="checkbox"/> Return from Leave of Absence			
<input type="checkbox"/> Adjustment in Pay			
<input type="checkbox"/> Retirement			
<input type="checkbox"/> External Hire			
<input type="checkbox"/> External Separation			

## Other Personnel Actions

---

Field Name	Description	R/O/C	User Action/Values/Comments
<b>Action type</b>	Action type	R	Will default “ <b>Change in Position</b> ”
<b>Reason for Action</b>	The reason why the action is being taken	R	<b>Must enter the reason “11” Payroll Area Transfer.</b>
<b>Employment</b>	In the Status section	R	Will default to Active and it is not available for editing
<b>Position</b>	The current position number	R	Enter the new position number either directly, if known or use the drop down arrow to aid in the selection.
<b>Personnel Area</b>	Will default from the previous position. <b>Blank it Out!</b>	R	Will default in the new Personnel Area upon pressing the Enter key after fields have been blanked out.
<b>Employee Group</b>	Will default from the previous position. <b>Blank it Out!</b>	R	Will default in the new Personnel Area upon pressing the Enter key after fields have been blanked out.
<b>Employee Subgroup</b>	Will default from the previous position. <b>Blank it Out!</b>	R	Blank out the information from the previous position .Use the drop down arrow to aid in selecting the correct employee subgroup.

*Screen: Copy Actions*

**Copy Actions**

Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.no. 3152

Name ACCESS TEEL

EE group 1 NA Personnel ar 1287 Northwest Region MWR

EE subgroup FT Reg Full Time SSN [Redacted]

From 09/07/2001 to 12/31/9999

**Personnel action**

Action type Change in Position

Reason for action 11 Payroll Area Transfer

**Status**

Employment Active

**Organizational assignment**

Position 10005098 Deputy MWR Director

Personnel area 1034 Jacksonville

Employee group 5 NF

Employee subgroup FT Reg Full Time

**Additional actions**

W: Record valid from 09/01/2001 to 12/31/9999 delimited at end DV2 (1) (200) mwrsp5 QVR 15:54



**NOTE:** After striking the Enter key or clicking the green check mark, you will receive a message stating **“W: Previous record will be delimited”**, i.e., the end date of the last action will now be populated with the “From date” of the new action. This message appears on each infotype.

Press the Enter key or click the green checkmark icon  to validate the record and then save it by clicking the Save icon. .

### Infotype 0001 – Copy Organizational Assignment:

**Copy Organizational Assignment**  
 Infotype Edit Goto Extras System Help

Org Structure


Personnel no **328** Name **Wilson** Status **Active**  
 EE group **2** NL Personnel ar **1287** Northwest Region MWR  
 EE subgroup **FT** Reg Full Time SSN **[REDACTED]**  
 From **04/15/2001** to **12/31/9999**

**Enterprise structure**  
 CoCode **1287** MWR COMNAVREG, N.W.  
 Pers.area **1287** Northwest Region MWR Subarea **1287** West Sound  
 Cost ctr **969** WS ADMIN 1287

**Personnel structure**  
 EE group **2** NL Payr.area **BA** NW Region  
 EE subgroup **FT** Reg Full Time

**Organizational plan**  
 Percentage **100.00** Assignment  
 Position **10004573** Clk Typist  
 Job key **10004572** GS 0322 04  
 Exempt ☐ Clerk Typist  
 Org. unit **10003252** Adm Supp  
 Org.key **1171** Administrative Support

**No Entry is required for this infotype.**

Press the Enter button or the green checkmark  to validate the entries. Save the Record.


**“W: Previous record will be delimited”**, (i.e., the end date of the last action will now be populated with the From date of the new action).

During the normal flow of this process, a pop-up window will appear to create a vacancy for the employee’s previous position. Click on the **“Yes”** button on this window. **The date must be changed to the date of the action.** Today’s date will default in, so if the date of action is different from today’s date, you must change it.

**Create Vacancy**

S 10004103 Personnel Specialist

Create on **04/15/2001**

Yes No  Cancel

Infotype 0006- Copy Addresses


**Copy Addresses**  
Infotype Edit Goto Extras System Help

Personnel no **328** Name **Wilson ...** Status **Active**  
 EE group **2** NL Personnel ar **1287** Northwest Region MWR  
 EE subgroup **FT** Reg Full Time SSN   
 From **04/15/2001** to **12/31/9999**


**Address**

Address type **Permanent Residence**  
 c/o   
 Address line 1 **1625 Bond's Crossing**  
 Address line 2   
 City/county **Seattle**  
 State/zip code **WA** Washington **98314**  
 Country key **USA**  
 Telephone number **360 396-5994**  
 Communications 

<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

 **NOTE:** Even if the employee's address does not change, you must copy this record with the position change date and save. All the applicable tax screens will now appear for completion. You must complete each tax infotype again and save.

**Each record must be saved with the new date in order to populate the new company code in ADP, during the position change action based on the activity transfer.**

Press the Enter key or click the green checkmark icon  to validate your entries. Save this record.



*Infotype 0041 – Date Specifications now appears:*

**Change Date Specifications**  
 Infotype Edit Goto Extras System Help

Personnel no: 3301 Name: ANGELA STITHWELL  
 EE\_group: 5 NF Pers.area: 1034 MWR JACKSONVILLE  
 EE subgroup: FT Reg Full Time SSN: Status: Active  
 From: 6/12/2002 to: 12/31/9999 Chng: 06/18/2002 HQ\_P657F8

Date type	Date	Date type	Date
01 Activity Start Date	06/12/2002	03 Service Comp Date	09/27/1997
04 Civilian Service	09/27/1997	06 Ret Plan Eligibility	06/12/2002
07 NAFI Comp Date	06/01/2000		

All fields will populate. Update as necessary.

**Date type 01 Activity Start Date**, which is the first date of employment at the current activity. The date will need to be changed when an employee transfers to a new payroll area, i.e. Mayport to Seattle or MWR to VQ.

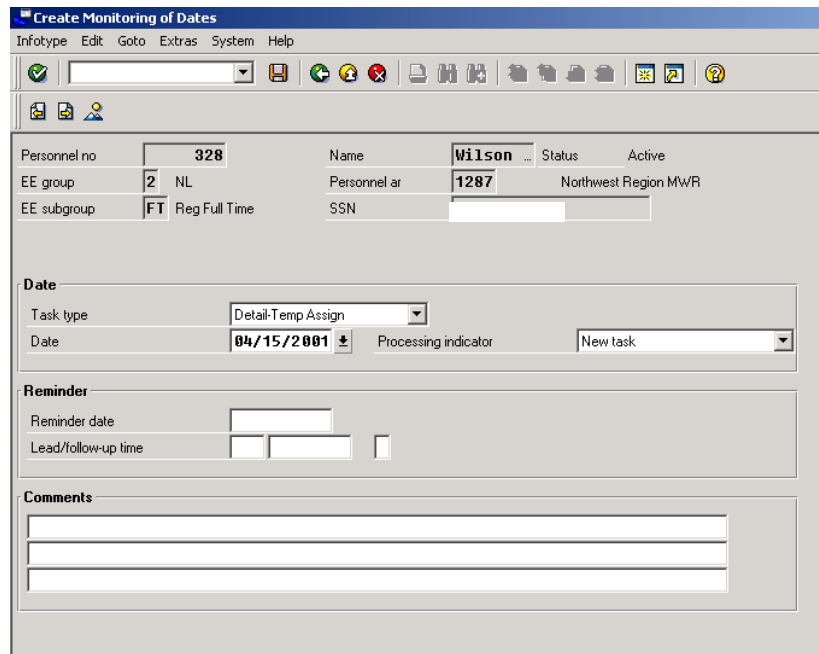
**Date type 04 Civilian Service Date**, which is the Service Computation Date minus the active duty military time. In most cases this will be the same as the Original hire date.

**Date type 03 Service Computation Date**, the date either actual or constructed by crediting service, used to determine annual leave accrual. For an employee with no creditable NAFI or military service, the service comp date is the effective date of the employee's first Federal civilian appointment. For an employee with prior creditable service, the service comp date is constructed by totaling the days, months, and years of the employee's creditable civilian and military service and subtracting that total from the effective date of the employees most recent appointment. When service credit of 4 years, 3 months, and 3 days is subtracted from the date, 1998-10-12, the result is 1994-07-09. Thus, the service comp date will then be 07-09-1994.

**Date type 06 Ret Plan Eligibility** is used for benefit retirement plan eligibility. This date will populate from the new hire action. This date will require updating when an employee changes from a Flex position to a Regular Full Time position.

**Date type 07 NAFI Computation Date**, the date either actual or constructed by crediting service, used to determine Regular NAFI employment length. For an employee with prior creditable service, The NAFI computation date is constructed by totaling the days, months, and years of the employee's creditable Regular NAFI service and subtracting that total from the employee's most recent appointment.

Press the Enter button and Save  the transaction.

*Infotype 0019 – Create Monitoring of Dates.*


**Create Monitoring of Dates**

Infotype Edit Goto Extras System Help



Personnel no: 328 Name: Wilson Status: Active  
 EE group: 2 NL Personnel ar: 1287 Northwest Region MWR  
 EE subgroup: FT Reg Full Time SSN:


**Date**  
 Task type: Detail-Temp Assign  
 Date: 04/15/2001 Processing indicator: New task

**Reminder**  
 Reminder date:   
 Lead/follow-up time:

**Comments**

The fields in this infotype are self-explanatory and can be filled in directly or by using the drop down arrows to aid in the selection. In our example, the task type has been filled by using the drop down arrow and selecting “**Detail – Temp Assign**”. We have also entered the date the action becomes effective, and entered the processing indicator “**New task**”. We could also have used the Comments section to write in any free text remarks needed.

If more Date Monitoring is needed enter the information after the Change in Position action is complete. Use PA30, Infotype 0019 and click on the create tab . Enter the information and Save .

Press the Enter key or click the green checkmark icon  to validate the record and then Save it.

## Other Personnel Actions

After saving the previous infotype the following one will appear:

### Infotype 0006 – Addresses Emergency Contact


The screenshot shows the 'Copy Addresses' infotype form in SAP. The form is titled 'Copy Addresses' and has a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The form contains several fields for personnel data and address information.

Personnel no	3154	Name	EVA WILSON
EE group	1 NA	Pers.area	1287 Northwest Region MWR
EE subgroup	FT Reg Full Time	SSN	
From	08/30/2001	to	12/31/9999
Status	Active		

**Address**

Address type	Emergency Contact		
c/o	JAMES WILSON		
Address line 1	166 CEDAR STREET		
City/county	JACKSONVILLE		
State/zip code	FL Florida	32212	
Country key	USA		
Telephone number	904	125-5648	
Communications			

If information has not changed, just save. Press the Enter key or click the green

checkmark icon  to validate the record and then Save it.

*Infotype 0007 – Planned Working*

**Copy Planned Working Time**

Infotype Edit Goto Extras System Help

Work schedule


Personnel no	3154	Name	EVA WILSON
EE group	1 NA	Pers.area	1287 Northwest Region MWR
EE subgroup	FT Reg Full Time	SSN	1 Status Active
From	08/30/2001	To	12/31/9999

**Work schedule rule**

Work schedule rule 2011

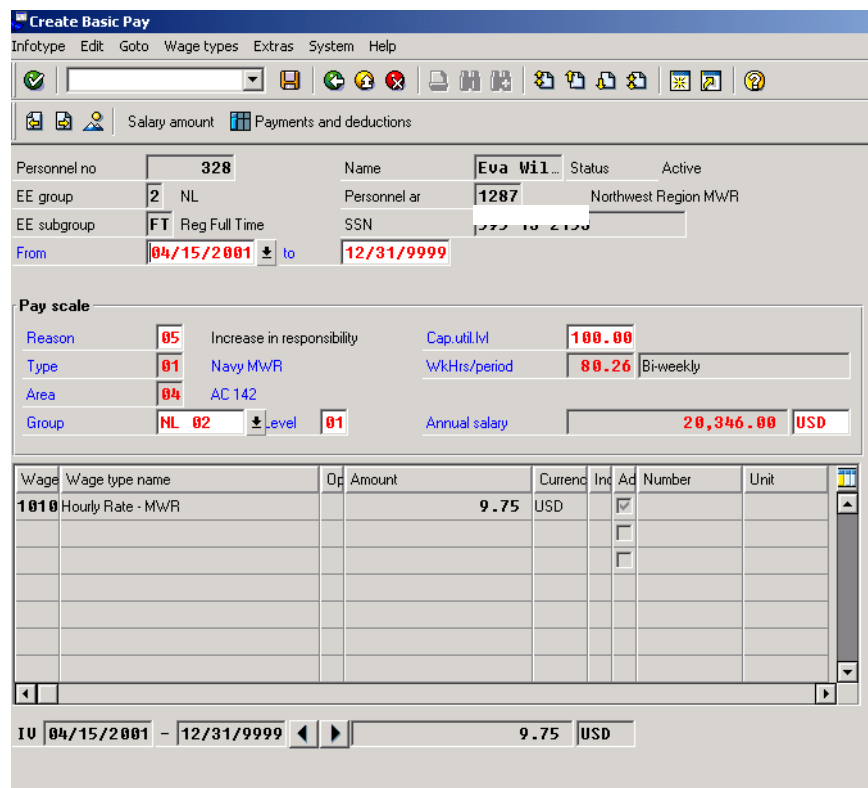
**Working time**

Employment percent	100.00
Daily working hours	8.03
Weekly working hours	40.13
Monthly working hrs	173.91
Annual working hours	2087.00
Weekly workdays	5.00

Enter the new Work Schedule Rule for the employee. Press the Enter key or click the green checkmark icon  to validate the record and then Save it.

You will receive warning message to check the basic pay infotype 0008. Move through this warning message by pressing the Enter key and continue saving the new work schedule rule.

*Infotype 0008 – Create Basic Pay*



**Create Basic Pay**  
 Infotype Edit Goto Wage types Extras System Help

Salary amount Payments and deductions


Personnel no **328** Name **Eva Wil...** Status **Active**  
 EE group **2** NL Personnel ar **1287** Northwest Region MWR  
 EE subgroup **FT** Reg Full Time SSN **272 10 2120**  
 From **04/15/2001** to **12/31/9999**

**Pay scale**

Reason **05** Increase in responsibility Cap.util.m **100.00**  
 Type **01** Navy MWR WkHrs/period **80.26** Bi-weekly  
 Area **04** AC 142  
 Group **NL 02** Level **01** Annual salary **20,346.00** USD

Wage	Wage type name	Op	Amount	Currenc	Ind	Ac	Number	Unit
<b>1010</b>	Hourly Rate - MWR		<b>9.75</b>	USD		<input checked="" type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		
						<input type="checkbox"/>		

IU **04/15/2001** - **12/31/9999** **9.75** USD

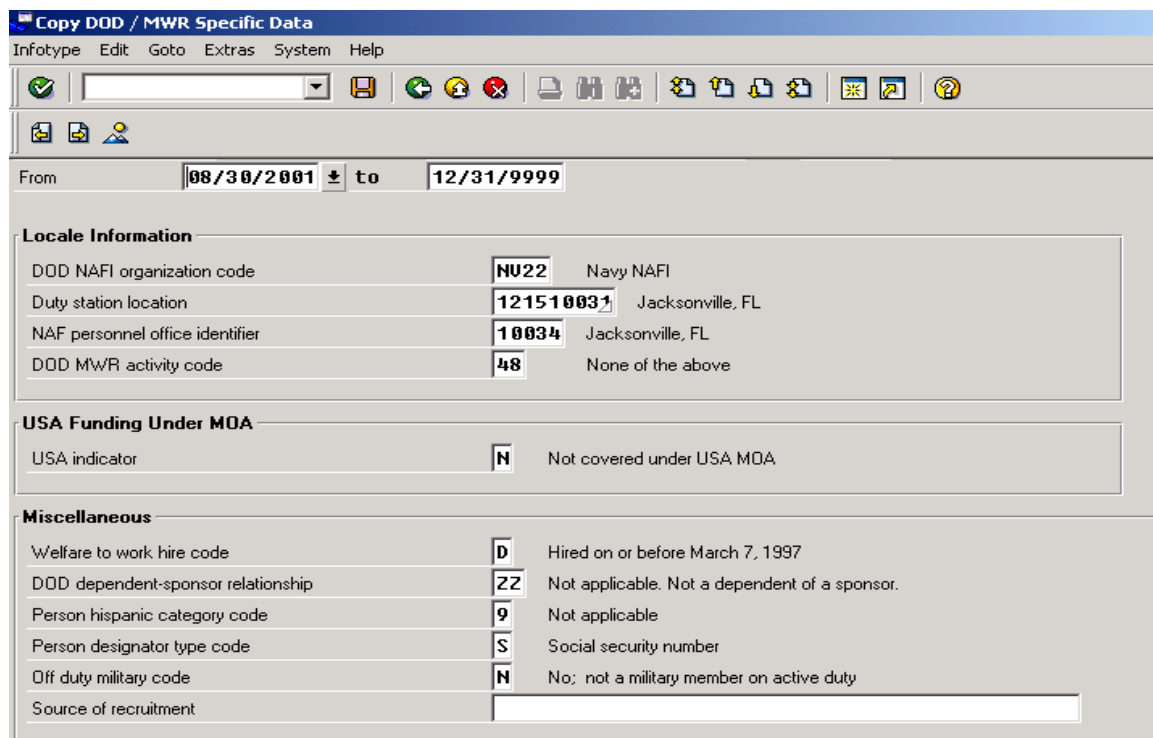
Enter any new basic pay information due to the position change of the employee. Press the Enter key or click the green checkmark icon  to validate the record and then Save it.

Infotype 0009 – Copy Bank Details

Copy Bank Details			
Infotype Edit Goto Extras System Help			
<div> </div>			
<div> </div>			
Personnel no	3154	Name	EVA WILSON
EE group	1 NA	Pers.area	1287 Northwest Region MWR
EE subgroup	FT Reg Full Time	SSN	Status Active
From	08/30/2001	to	12/31/9999
<b>Bank details</b>			
Bank details type	Main bank		
Payee	EVA WILSON		
Postal code/City	32212	JACKSONVILLE	
Bank country	USA		
Bank key	284085375	FIRST SOUTH CU	
Bank account number	1526489	Bank control key	01
Payment method	T EFT (ACH)		
Payment currency	USD		

**Note:** Even if the information does not change, you must save this record with the new date. The employee's record must be saved in order to populate ADP. This means the employee will be pre-noted for the first or second pay period in the new location.

### *Infotype 9001 – Copy DOD/MWR Specific Data*



**Copy DOD / MWR Specific Data**  
Infotype Edit Goto Extras System Help

From **08/30/2001** to **12/31/9999**

**Locale Information**

DOD NAFI organization code	<b>NU22</b>	Navy NAFI
Duty station location	<b>121510031</b>	Jacksonville, FL
NAF personnel office identifier	<b>10034</b>	Jacksonville, FL
DOD MWR activity code	<b>48</b>	None of the above

**USA Funding Under MOA**

USA indicator	<b>N</b>	Not covered under USA MOA
---------------	----------	---------------------------


**Miscellaneous**

Welfare to work hire code	<b>D</b>	Hired on or before March 7, 1997
DOD dependent-sponsor relationship	<b>ZZ</b>	Not applicable. Not a dependent of a sponsor.
Person hispanic category code	<b>9</b>	Not applicable
Person designator type code	<b>S</b>	Social security number
Off duty military code	<b>N</b>	No; not a military member on active duty
Source of recruitment		

**You must change all applicable information due to the position change (activity transfer).**

**Note: The Duty Station Locator and the NAF Personnel Office Identifiers MUST be changed to accommodate the new activity.**

The ADP Company Code and ADP File Number are “grayed” out and cannot be changed. The new information for these fields will be populated once the ADP file has been created in the new ADP Company code.

When complete save the transaction by clicking on the save icon .

The next infotype will be Kronos information-Infotype 9005.


Kronos information-Infotype 9005.

**Copy Kronos Information**  
 Infotype Edit Goto Extras System Help

Personnel no **9933** Name **[REDACTED]**  
 EE group **1** NA Pers.area **1034** MWR NAS JACKSONVILLE  
 EE subgroup **FT** Reg Full Time SSN **[REDACTED]** Status Active  
 Start **03/18/2003** to **12/31/9999**

**Kronos Information**

Kronos Badge Number **125465542** ☐ No Badge Necessary  
 Terminal Group **JAXCLOCKS**  
 Local Labor Level **8042000007** A128 ADMIN  
 Person Type **1** TK Employee  
 Kronos login **JAX\_MSANDERS**  
 Access Profile **MANAGER 2**  
 Labor Level Set **[REDACTED]**

All information will need to be changed for the position change. If Kronos is not being used check the box for “No Badge Necessary”. When complete save the information by clicking on the save icon .

General Benefits will be the next infotype.

Infotype 0171 – Copy General Benefits Information


**Copy General Benefits Information**  
 Infotype Edit Goto Extras System Help

Personnel no **328** Name **Eva Wil...** Status Active  
 EE group **2** NL Personnel ar **1287** Northwest Region MWR  
 EE subgroup **FT** Reg Full Time SSN **[REDACTED]**  
 From **04/15/2001** to **12/31/9999**

**General Benefits Information**

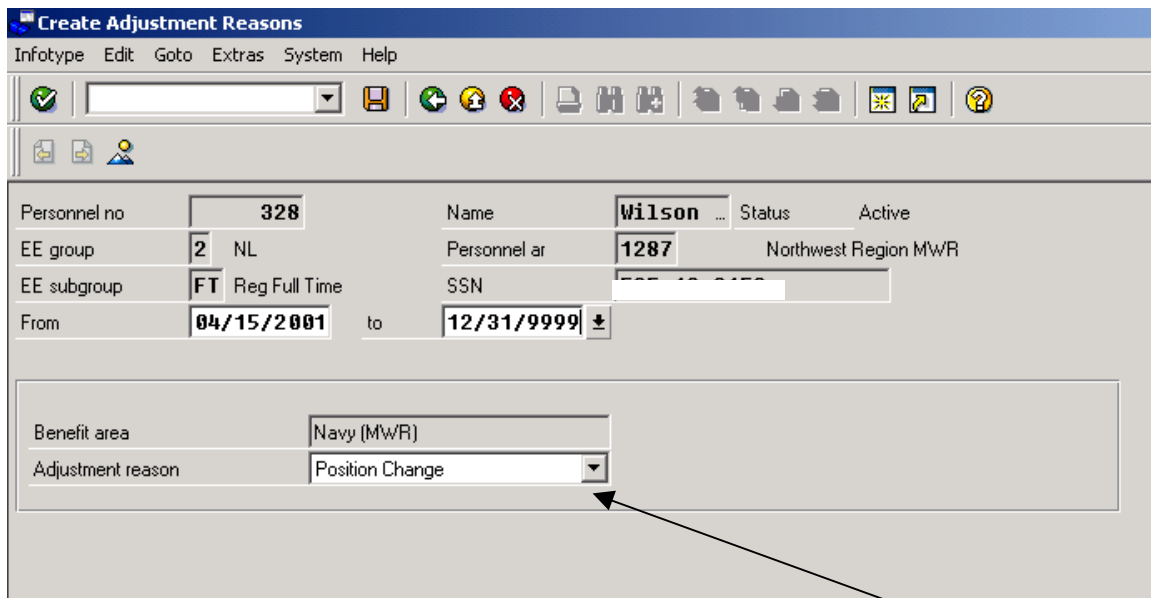
Benefit area **NU** Navy (MWR)  
 1st Program grouping **SE** Seattle  
 2nd Program grouping **FULL** Full-Time

No data entry is required. Information will be populated based on the position information. However, this record **must** be saved.

Press the Enter key or click the green checkmark icon  to validate the record and Save it.




### *Infotype 0378 – Adjustment reasons*



The screenshot shows the 'Create Adjustment Reasons' window. The fields are as follows:

Field	Value
Personnel no	328
Name	Wilson
Status	Active
EE group	2 NL
Personnel ar	1287
EE subgroup	FT Reg Full Time
SSN	
From	04/15/2001
to	12/31/9999
Benefit area	Navy (MWR)
Adjustment reason	Position Change

The field “Adjustment Reason” will already be filled in based on the Position Change action. No entry is required. However, the record **must** be saved.

Press the Enter key or click the green checkmark icon  to validate the record and then Save it.

The Personnel Action Screen will be shown and the user receives the message “**Record Created**”.

This process is now completed.

**Note:** If the employee is now eligible for benefits, follow the instructions for **Benefit Enrollment**.